



INDIANA DEPARTMENT OF WORKFORCE DEVELOPMENT

TAA & TrackOne

Developed By: Indiana Department of Workforce Development
Strategic Initiatives Unit

@Work Solutions, Inc.

Presented: May 11, 2007

TAA & TrackOne

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TAA & TrackOne Introduction

Picture this scenario. You walk into a business to get assistance with your widgets. A cordial person informs you that you need to fill out some forms and bring in some documentation to determine if he can help you. You fill out everything. When you return with the documentation, he tells you that he may be able to assist you with only a part of your widget problem. He reports that he has a partner who may be able assist you with the rest. You agree. He sets up another appointment (which means another trip for you) to see the partner who is located in the same office. Are you wondering why you have to come back if the partner is in the same office? However, being an amiable person, you leave and return for your appointment. At that time, the partner asks you to fill out more forms and provide additional documentation to see if you are eligible for assistance with your widgets. You quickly realize that the documents and paper work are very similar to the forms you completed the first day you arrived at the business. Are you frustrated yet? Is this premier customer service?

Grow Jobs.

Increase Personal Income of Hoosiers.

Deliver Premier Customer Service.

Sound familiar? These are the priorities of the Indiana Department of Workforce Development. We continually strive to make our processes easier for DWD customers to use, but frequently we end up making them jump through hoops, many times the same hoops. Common measures and service integration is designed to create a single hoop.

So how does TrackOne help us achieve our priorities and reduce the number of hoops?

On the next page, a flow chart depicts three service delivery processes.

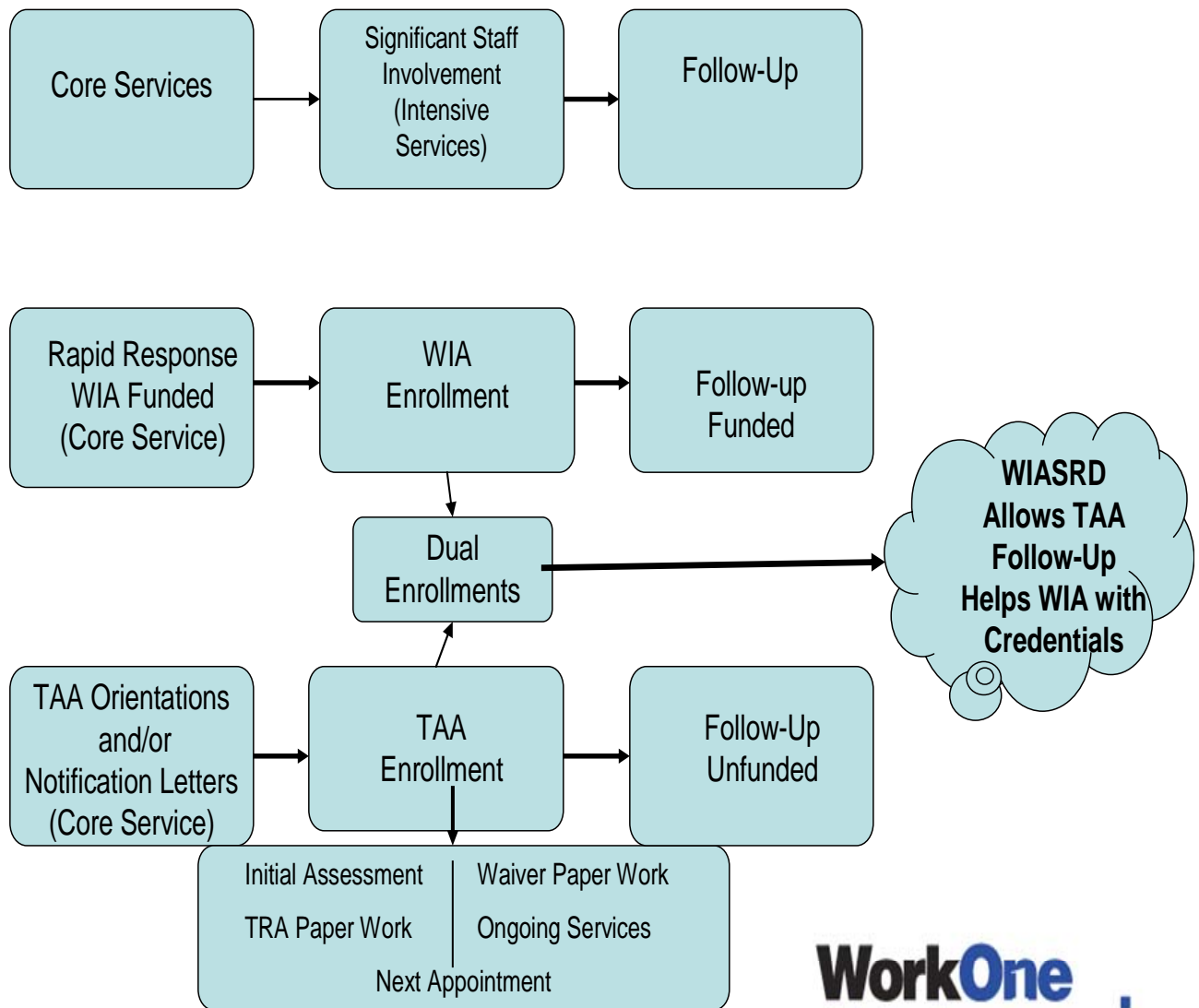
1. The flow of generic services: Core → Intensive (Significant Staff Involvement) → Follow-up
2. The WIA service flow
3. The TAA flow

In between is a depiction of co-enrollment or the Z-plan. Co-enrollment allows case managers to leverage program resources to build a comprehensive service package for clients.

These flows, common measures and the concepts of service integration have all been programmed in to a single case management system, TrackOne.

TAA & TrackOne Service Delivery Model

TrackOne Service Delivery Flow WIA/TAA



TAA & TrackOne Common Measures

Common measures is simply a uniform metrics system that measures program performance across government agencies based upon a common set of definitions and measurement equations. It is designed to allow Congress to easily determine how effective programs are in providing services to clients.

Common measures are a management tool. They are a starting point for conversations about similar training and employment activities, based on the core purposes of the workforce system. Key attributes include:

- Universal language and standardized data
- Employment-focused measures for adult programs and skill attainment measures for youth programs
- Designed in partnership with other federal employment and training agencies

The Adult Common Measures are:

- Entered Employment Rate
- Employment Retention Rate
- Average Earnings

TrackOne “mines” information out of client transaction records in order to calculate common measures.

TAA & TrackOne Common Measures

We are not alone in adopting common measures. Below is a list of agencies required to use common measures. All states are required to capture common measures data for all United States Department of Labor funded programs.

In addition to programs administered by ETA, the following Federal programs are subject to the common measures:

Department of Labor

Programs for Veterans:

- Veterans' Workforce Investment Program
- Disabled Veterans' Outreach Program
- Local Veterans' Employment Representatives
- Homeless Veterans' Reintegration Program

Department of Education

Adult Education

Rehabilitation Services:

- Vocational Rehabilitation Grants to States
- American Indian Vocational Rehabilitation Services
- Supported Employment State Grants
- Projects with Industry
- Migrant and Seasonal Farm Workers

State Grants for Incarcerated Youth Offenders

Vocational Education:

- Carl D. Perkins Vocational and Technical Education Act - State Grants
- Carl D. Perkins Vocational and Technical Education Act - Tech Prep State Grants
- Carl D. Perkins Vocational and Technical Education Act – Tribally Controlled Postsecondary
- Vocational Institutions

Department of Health and Human Services

Temporary Assistance to Needy Families

Department of Veterans Affairs

Vocational Rehabilitation and Employment Services and Benefits

Department of the Interior

Job Placement and Training

Department of Housing and Urban Development

YouthBuild

TAA & TrackOne Common Measures

This chart defines the TAA performance measures.

TAA Program Measures	Definition	Goal	Actual	Meeting
Entered Employment Rate	% of participants employed soon after exit	70%	69.6%	No
Employment Retention Rate	% of participants employed several months after exit	89%	92.1%	Yes
Earnings Replacement Rate	Increase in participants earnings from pre-program to post-exit	80%	116%	Yes

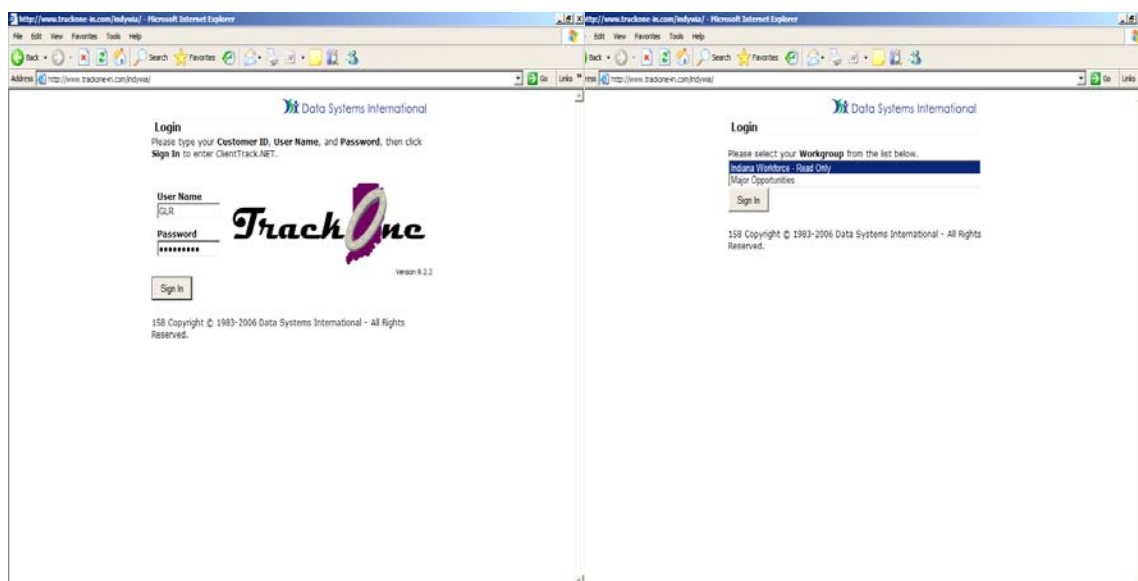
TAA & TrackOne

Navigating TrackOne

As with any software program, the main ingredient to its successful use is learning its features and how to navigate through the program. TrackOne, as its name implies, is a tool for tracking the work you are doing with TAA. As with most tools, the more you know about how it operates and the more you practice using it, the more effective it becomes.

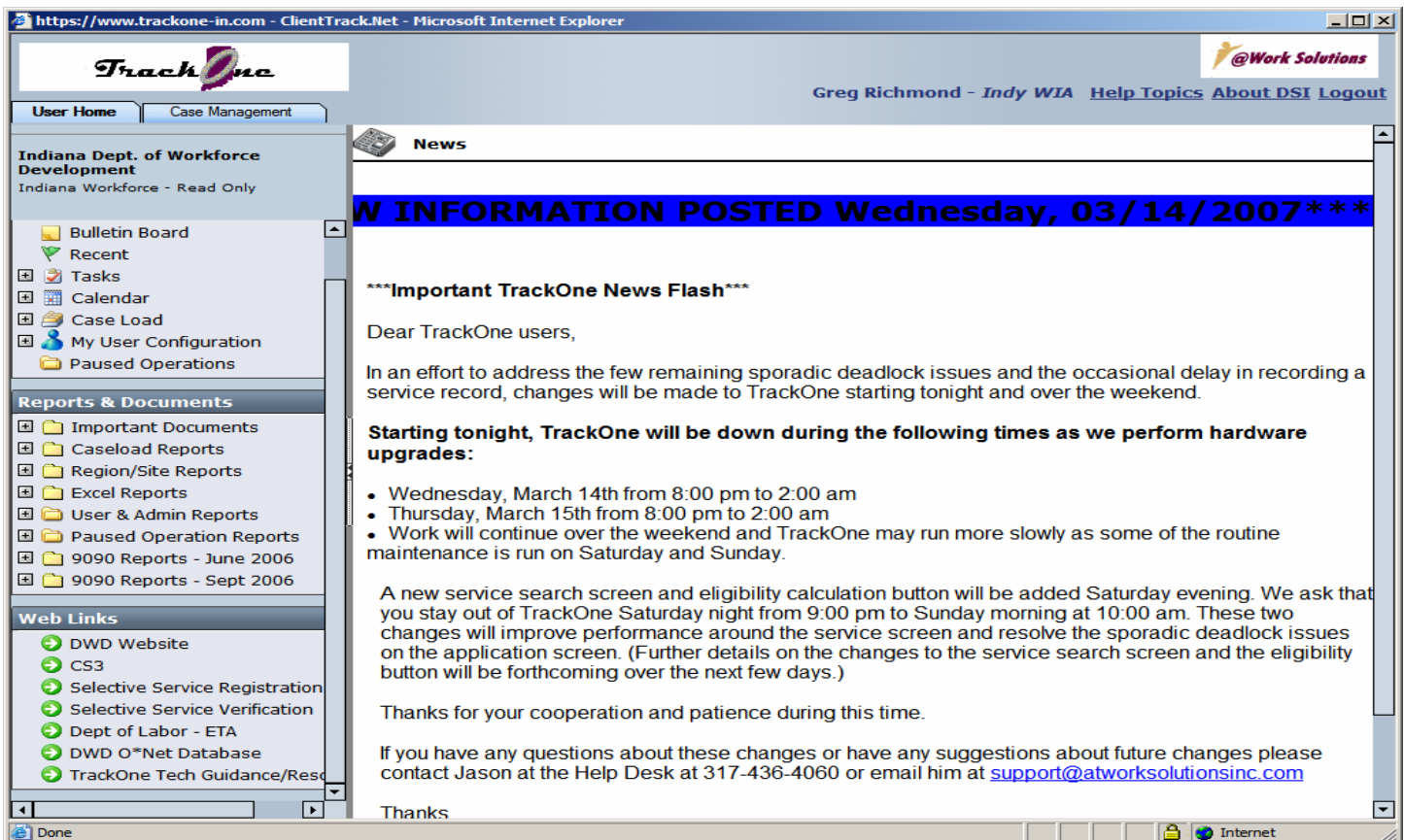
Typically, anything new can be a little disconcerting at first, but with time, we become proficient and comfortable with the tool. The goal of this class is to help you make the transition as smoothly as possible.

First, access the Internet and enter the web address: <http://www.trackone-in.com/indywia/>. This opens the website's log-on screen (see screen shot below on left); enter your password and click sign-in. This will open the next screen (screen shot below on the right) that asks you to choose which work group you want to open. We will open the work group by clicking to select Indiana Workforce and then clicking "Sign-in." This will open the TrackOne home page (see the screen shot on the next page).



TAA & TrackOne

Navigating TrackOne



The home page has several key parts we call “panes.”

1. The top pane is a narrow band across the top of the page. It shows the software’s name, the name of the individual signed in, the company logo for the software owner, and hyperlinks to “Help Topics,” “About DSI (Data Solutions International)” and the “Logout” link.
2. The left side panel is our navigational panel. This panel has two tabs — each tab contains links to the various screens for operations and information in the system. The left hand tab takes you to the User Home page and the right tab takes you to the case management screens. We will be covering these links in detail on the following pages.
3. The center pane is the information and work screen for TrackOne. Let us start with the User’s Home tab first.

TAA & TrackOne Bulletin Board

The TrackOne Bulletin Board allows you to interact with your peers throughout the state. You can pose questions, observe, and share best practices. Each person's posting will show the subject of the posting, the date and time the message was posted, and the name of the person posting. Please note that the column headings (Subject, Created Date, and Posted By) are underlined. Clicking on them will do an ascending or descending sort.

TrackOne

Indiana Dept. of Workforce Development
Indiana Workforce - Read Only

Greg Richmond - Indy WIA [Help Topics](#) [About DSI](#) [Logout](#)

[Post New Message](#) [Cancel](#)

Bulletin Board

10 records found.

<u>Subject</u>	<u>Created Date</u>	<u>Posted By</u>
RE: Back Button	9/9/2006 11:46:00 AM	Anita Peters
Back Button	9/5/2006 2:03:00 PM	John Smoot
Cheryl	7/20/2006 2:25:00 PM	Jeremy Kerr
Jeremy	7/18/2006 3:57:00 PM	Cherryl Adams
Re: Alerts	7/18/2006 9:16:00 AM	Jeremy Kerr
Alerts	7/17/2006 9:08:00 AM	Cherryl Adams
New Button	7/13/2006 12:03:00 PM	John Smoot
url for CS3	7/12/2006 9:45:00 AM	Becky Kersey
Pitch In Lunch	1/28/2006 9:00:00 AM	Ken Davidson
CS3	1/28/2006 8:59:00 AM	Ken Davidson

TrackOne

- User Home Page
- Bulletin Board**
- Recent
- Tasks
- Calendar
- Case Load
- My User Configuration
- Paused Operations

Reports & Documents

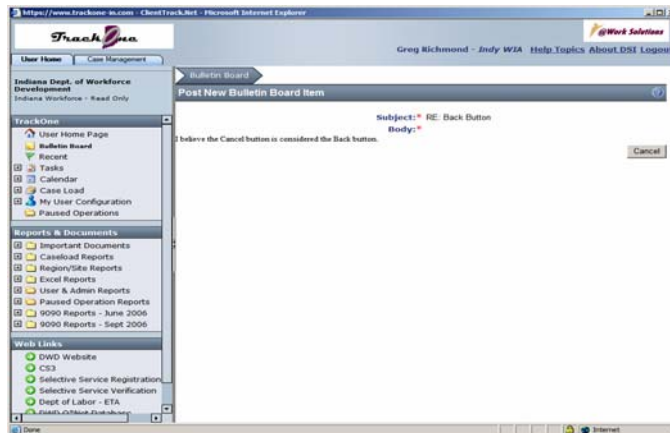
- Important Documents
- Caseload Reports
- Region/Site Reports
- Excel Reports
- User & Admin Reports
- Paused Operation Reports
- 9090 Reports - June 2006
- 9090 Reports - Sept 2006

Web Links

- DWD Website
- CS3
- Selective Service Registration
- Selective Service Verification
- Dept of Labor - ETA
- DWD OSNet Database

TAA & TrackOne Bulletin Board

To the left of the subject column heading, you will see a file folder icon. Clicking on this icon will open the message.



In the lower right hand quarter of the top pane, you will see two action buttons. The first is “Post New Message.” Clicking this button will open the message-composition screen.



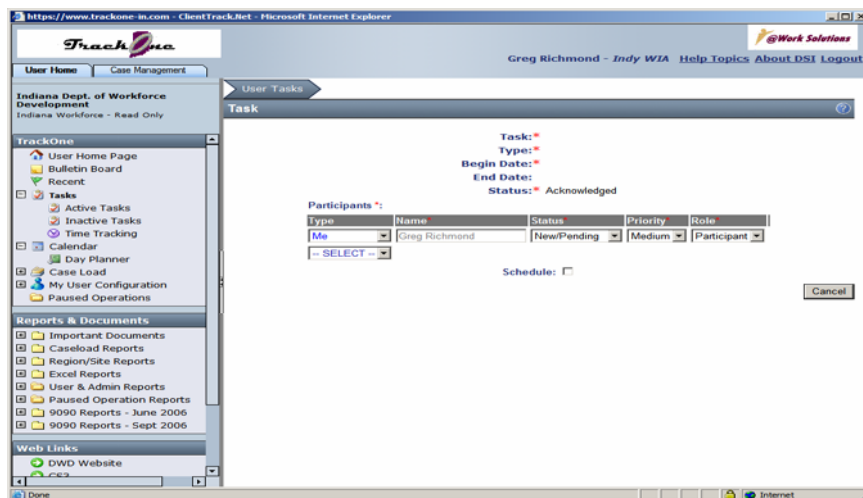
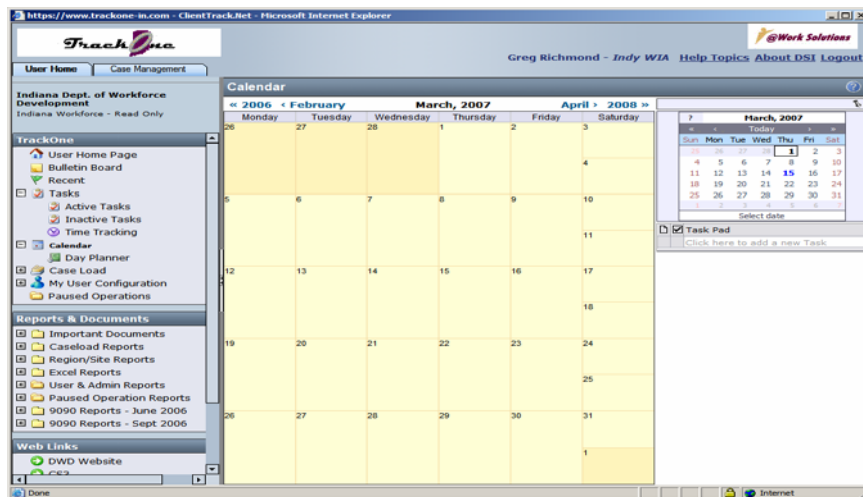
TAA & TrackOne Calendar

TrackOne has a calendar that is very similar to your Outlook calendar. The calendar has two different views, “Monthly” and “Daily.”

Below is an example of the Monthly Version.

To add an appointment or important event to your calendar, click on the day that you need a reminder, and a dialogue box will open.

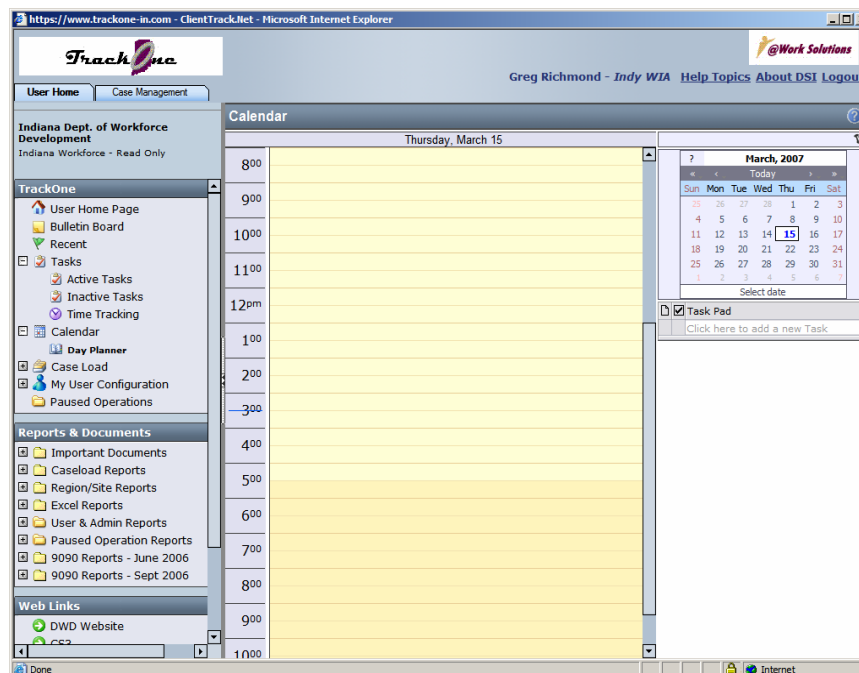
Describe the reminder or task in the boxes and identify a date that it is to complete. If it has already been completed, fill in the completed date, any other appropriate information, and select “Save.”



TAA & TrackOne Calendar

The daily view can be used like a Day Timer to help with your time management.

You can enter appointments, tasks, etc. It works similarly to your Outlook calendar. Instead of clicking on the calendar as you did in the monthly view, you click into the text box under the label “Task Pad.” It is on the right side of the screen towards the top. If you enter a participant’s task, it will appear as a reminder on your calendar, and it will show on the client’s file as well.



TAA & TrackOne Paused Operations

For security purposes, TrackOne will time out after 30 minutes of inactivity. Interruptions are a normal part of our work lives. The paused operations function allows case managers to temporarily “freeze” their work before it is written to the database. Your work is stored in a special location under the “User Home” tab. When you are ready to finish and save your work to the database, click on the “User Home” tab, then click the “Paused Operations” icon on the Navigation pane. Your paused work item will open and you can proceed.

The following are some scenarios where Paused Operations are helpful:

1. A fire alarm goes off.
2. Client shows for an appointment but forgot an important piece of documentation necessary for the eligibility determination process.
3. Client leaves in the middle of an eligibility determination appointment to visit the restroom and doesn't return.



Let's take a short pause

TAA & TrackOne Paused Operations

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA [Help Topics](#) [About DSI](#) [Logout](#)

User Home Case Management

Indiana Dept. of Workforce Development
Indiana Workforce - Read Only

TrackOne

- User Home Page
- Bulletin Board
- Recent
- Tasks
 - Active Tasks
 - Inactive Tasks
 - Time Tracking
- Calendar
 - Day Planner
- Case Load
 - Active Cases
 - Inactive Cases
- My User Configuration
 - My Team
 - My Information
 - Change My Password
- Paused Operations**

Reports & Documents

- Important Documents
- Caseload Reports
- Region/Site Reports
- Excel Reports
- User & Admin Reports
- Paused Operation Reports

Paused Forms

Identification	Form Description	Step	Time Paused
----------------	------------------	------	-------------

Paused Workflows

Client Name	Workflow	Step
-------------	----------	------

Cancel

Done Internet

TAA & TrackOne Reports

TrackOne has a multitude of reports that can be generated. There are many that are available within the program on the “User Home” tab. These are referred to as “canned” reports. Additionally, Master Users can access the raw data in order to create a variety of ad hoc reports.

Reports can be generated at the following levels:

- Statewide
- Region
- Site
- Case Manager

Details about the TrackOne reports are located on the DWD TrackOne website through the following link:

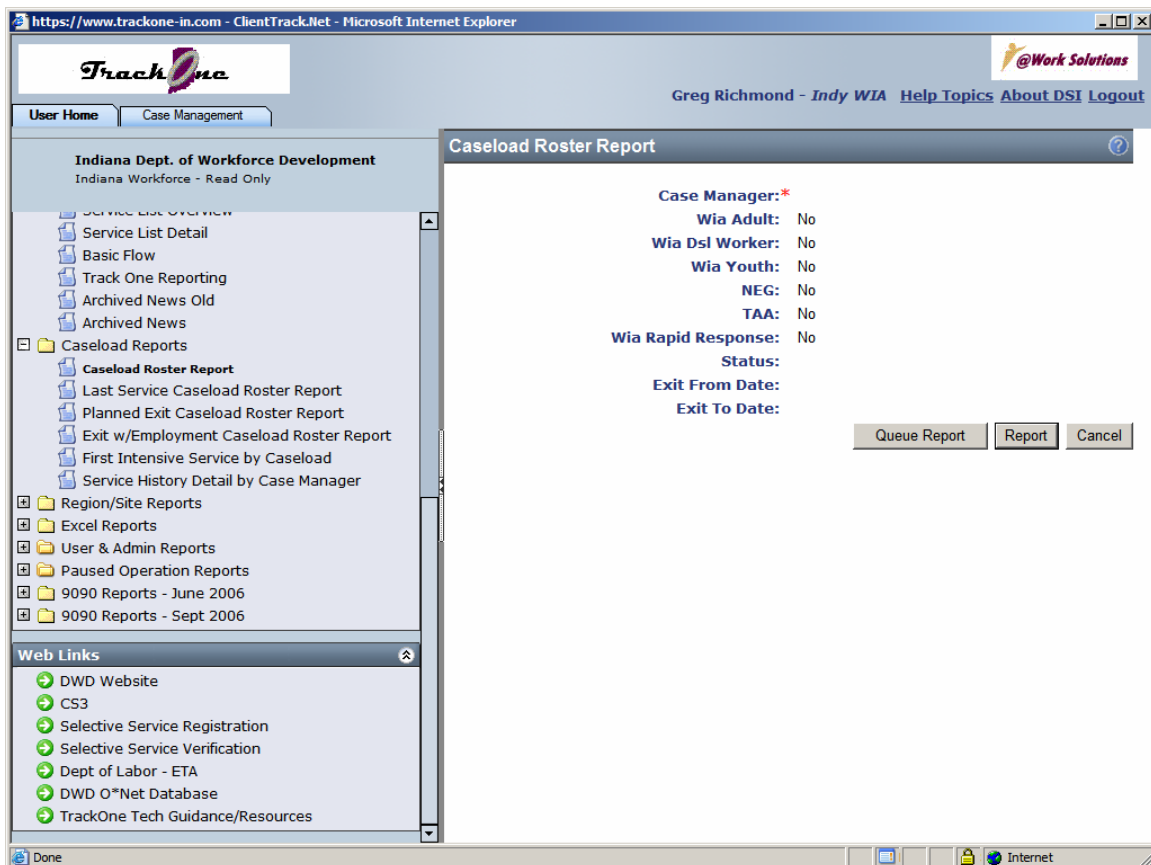
http://www.in.gov/dwd/partners/TrackOne/to_TrackOneReportsDefined.pdf.

The manual, entitled “TrackOne Reports Defined,” gives specific information on the uses of the canned reports and how to generate them.

TAA & TrackOne Caseload Reports

The following screen shot shows the available “canned” caseload reports contained within TrackOne. Specific details regarding the use of each of these reports is contained in the TrackOne Reports Defined manual.

Please note that many of the canned reports in TrackOne are multi-functional.



TAA & TrackOne Web Links

The last section of the navigation pane that we will look at is called “Web Links.”

These are actual hyperlinks that take you to important resources needed for case management.

DWD: This is the DWD website, which has valuable links for clients and staff.

CS3: This is the Internet version of DWD’s Job Search and Match system.

Selective Service Registration: Even though there has not been a draft for many years, males between the ages of 18 and 25 or males born after 12/31/1959 must register with the Selective Service. The client can register online from this site.

Selective Service Verification: This is a website for verifying that male participants between the ages of 18-25 are registered with Selective Service.

The U.S. Department of Labor’s ETA: Contains a lot of program information learning aids, and various resources that are helpful.

DWD’s O*Net Database: Access to the O*Net system allows you to look up O*Net Occupational Codes as well as excellent labor market and career exploration links.

TrackOne Tech Guidance/Resources: This is a webpage within the DWD website. It provides links to technical notices, policy and procedural notices, training materials and more.

TAA & TrackOne Web Links

Several Web links are posted on the “User Home” tab within TrackOne. These Web links allow the user to access information easily from within TrackOne.



TAA & TrackOne Case Management

The case management tab is where you will be doing the majority of your work.

TrackOne stores each client's records in an electronic folder. This folder contains all of the information pertaining to the particular client. It contains the following information:

- Client demographic information
- Application/Registration/Enrollment records for each program
- Service Records (core, significant staff involved/intensive/training, follow-up)
- Funding obligation records
- Case Notes

In order to create an electronic folder for new clients, you must capture and enter the following basic demographic information in TrackOne:

First Name	Last Name
Social Security Number	Veteran Status
Employment Status	Date of Birth
Gender	Race
Ethnicity	Disability Status

Use the "Find Client" feature to determine if the client has an existing electronic folder in the system before generating a new one.

TAA & TrackOne

Find A Client

The “Find Client” button is the second link you will see at the top of the “Case Management” tab navigation pane. You will want to attempt to find your client by Social Security number, last name, first name or birth date. A Social Security number should give you a unique result, but the other choices may generate a list of clients. You need to verify that you are selecting the right person.

TIP: It is best to keep your search as broad as possible. TrackOne searches for a record that exactly matches what you type in to the search window. Many people use different abbreviations, spacing and punctuation which can impact your search.

Internet Explorer window showing the TrackOne search interface. The browser title is "Greg Richmond - Indy WIA Training". The page header includes "Help Topics About DSI Logout". The search form contains the following fields:

- Last Name:
- First Name:
- Social Security Number:
- Birth Date:
- Scan Card ID:

Buttons: Search, Cancel

Internet Explorer window showing the TrackOne search interface with search results. The browser title is "https://www.trackone-ia.com - ClientTrack.Net - Microsoft Internet Explorer". The page header includes "Help Topics About DSI Logout". The search form contains the following fields:

- Last Name:
- First Name:
- Social Security Number:
- Birth Date:
- Scan Card ID:

Buttons: Search, Cancel

Search Results:

1 records found.

Last Name	First Name	Social Security Number	Birth Date	Gender	City	Home Phone	Scan Card ID
Mantle	Mickey	000-00-0007	2/5/1953	Male	Indianapolis		

TAA & TrackOne Add a New Client

At the top of the "Case Management" tab are two links. The screen pictured below will open when you click the "Add New" link. We will be getting in to applications in depth when we discuss the "Enrollment and Application" link.

NOTE: Before inputting a participant as new, you need to make sure the participant is not already in the system.

TrackOne
User Home Case Management
Add New Client Find Client
Hantle, Mickey
000-00-0007
2/5/1953

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

Step 1 Step 2

Participant Identification
Fill in the information to identify your participant in the boxes below.

- If you are adding a new participant, complete the required fields before clicking **Next**.
- If you want to check to make sure that your participant does not already exist in the system, type some identifying information such as social security number, or the first few letters of the participant's last name, and click **Next**.

Last Name:
First Name:
Social Security Number:
Birth Date:

Next Pause Cancel

TrackOne
User Home Case Management
Add New Client Find Client
Hantle, Mickey
000-00-0007
2/5/1953

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

Step 1 Step 2

Participant Identification
Fill in the participant's primary identifying information

Universal/Case Services Participants: The following information is required

Last Name:
First Name:
Middle Name:
Suffix:
Social Security Number:
Employment Status:
Last off from TAA Certified Employer:
Employer:
TAA Position #:

Veteran Information
Veteran Status:
Separation Date:

Optional Fields (Participant must be offered the opportunity to provide Equal Employment/Demographic information. These fields are required for the application, but not required for Case Services. If available, please complete.)

Birth Date:
Client Age:
Gender:
Ethnicity:
Hispanic/Latino Ethnicity:

Race (If the client self-identified one or more of the race categories below, check all that apply. Otherwise, check Did Not Self-Identify Race.)

American Indian/Alaskan Native: ☐
Asian: ☐
Black/African American: ☐
Hispanic/Latino: ☐
White/Caucasian: ☐
Did Not Self-Identify Race: ☐

Additional Participant Information

Home Address:
Zip Code:
City:
State:
Country:
Home Phone:
Work Phone:
Cell Phone:
Email Address:
Highest Grade Completed:
Highest Degree Attained:
Unemployment Insurance (UI) Status:
Citizenship:

Org/Region Information (These values will be automatically assigned by the system)

Created By Org ID:
Organization Name:
New Region Code:
Old WIA Code:
Date Created:

Previous Next Pause Cancel

TAA & TrackOne Add New Client

Before we can proceed with the Navigation pane, we are going to enter a new participant. The premise is that you have held a TAA Orientation and you are ready to record the information in TrackOne for your client. First, you have verified that your client is not in the system. Next, click the “Add New” button.

The screenshots show the 'TrackOne' web application interface. The left screenshot displays the 'Participant Identification' step with fields for Last Name, First Name, Social Security Number, and Birth Date. The right screenshot shows the same screen with an orange arrow pointing to the 'Next' button.

Enter the “Participant Identification” information and click the “Next” button.

TIP: Notice the top of the screen. There is an indicator that shows the number of steps in this process and the current step. These bubbles tell you where you are in a multi-step/screen function.

Most of the items are self-explanatory so now you will simply fill in the fields. The fields marked by an asterisk are required. We are going to look at the items with drop down boxes or search boxes or a list to choose. When you reach the “Laid off from TAA Certified Employer,” click the magnifying glass. This will open a search dialogue box.

The screenshots show the 'TrackOne' web application interface. The left screenshot displays the 'Participant Identification' step with fields for Last Name, First Name, Social Security Number, and Birth Date. The right screenshot shows the 'Affected Employer' search dialog box with fields for TAA Petition #, Company, and Location.

This box is for locating the “Affected Employer.” You can search by TAA Petition #, company name, or city. The search by “petition #” should be unique and give a single response.

TAA & TrackOne Add New Client

The search will bring up a list of companies. Select the name of the company where the participant worked. Next, click the down list arrow on the “Veteran Status” field. Select an appropriate response from the list. The choices are shown expanded on the figure.

The left screenshot shows the 'Participant Identification' step in the TrackOne software. A search for 'Kubek, Tony' has been performed, and a list of results is displayed. The right screenshot shows the 'Veteran Information' step. The 'Veteran Status' dropdown menu is expanded, showing the following options: 'Yes - Served more than 180 days', 'No', 'Yes, Other Eligible Person', and 'Yes - Served 180 days or less'.

The next field is the Disabled Veteran field. Click the down list arrow and select the appropriate response from the list the list of choices been expanded on the figure. The next drop field is used to record the client's disability status.

The left screenshot shows the 'Disabled Veteran' field in the TrackOne software. The dropdown menu is expanded, showing the following options: 'Yes', 'Yes, Special disabled', and 'No'. The right screenshot shows the 'Disability Status' field. The dropdown menu is expanded, showing the following options: 'Yes, Substantial Barrier', 'Yes, Not Substantial Barrier', and 'No'.

TAA & TrackOne Add New Client

The next several fields allow the user to record information about the client's educational level and status, along with UI status.

TrackOne ClientTrackNet - Microsoft Internet Explorer

Greg Richmond - Judy WIA Training Help Topics About DSJ Logout

Did Not Self-Identify Race: ☐

Additional Participant Information

Home Address: 10 North Senate
 Zip Code: 46204
 City: Indianapolis
 State: IN
 County: Marion
 Home Phone: 317-232-7739
 Work Phone:
 Cell Phone:
 Email Address:
 Highest Grade Completed: -- SELECT --
 Highest Degree Attained: No grade completed
 Unemployment Insurance (UI) Status:
 Citizenship:
 Org/Region Information-These values will be automatic:
 Created By Org ID:
 Organization Name:
 New Region Code:
 Old WSA Code:
 Date Created:

Previous Finish Pause Cancel

TrackOne ClientTrackNet - Microsoft Internet Explorer

Greg Richmond - Judy WIA Training Help Topics About DSJ Logout

Did Not Self-Identify Race: ☐

Additional Participant Information

Home Address: 10 North Senate
 Zip Code: 46204
 City: Indianapolis
 State: IN
 County: Marion
 Home Phone: 317-232-7739
 Work Phone:
 Cell Phone:
 Email Address:
 Highest Grade Completed: -- SELECT --
 Highest Degree Attained: No grade completed
 Unemployment Insurance (UI) Status:
 Citizenship:
 Org/Region Information-These values will be automatic:
 Created By Org ID:
 Organization Name:
 New Region Code:
 Old WSA Code:
 Date Created:

Previous Finish Pause Cancel

The remaining fields gather additional information about the client.

NOTE: While it is always best to capture as much information about the client as early as possible, you are only required to capture the 10 basic demographics (first name, last name, SSN, veteran's status, employment status, birth date, race, ethnicity, gender and disability status) before entering a core service. For the TAA program, core services are defined as the TAA Orientation and Notification Letter.

NOTE: If you need to edit any information that you have entered on these screens at a later date, use the "Edit Participant" link.

TAA & TrackOne Address History

This screen is designed to show the address history of a client at a glance.

Click on the “Address History” link on the navigation panel. The screen shown below will open. This will show the client’s current address.

The screenshot shows the TrackOne web application interface. The left navigation panel is expanded to show the 'Address History' link under the 'Case Management' section. The main content area displays the 'Address History' for client 'Berra, Yogi'. It includes a table with columns: Address Type, Address, City, State, Zip, Begin Date, and End Date. The table shows one record: 'Current Mailing' at '10 North Senate, Indianapolis, IN 46204', starting on '4/18/2007'. Above the table are buttons for 'Add New', 'Address History Report', and 'Cancel'. A text box explains that the client's address history displays below and provides instructions on how to add, edit, or delete an address.

To add a new address, click on the “Add New” button and TrackOne will take you to the “Add Address” screen as shown in the screen shot below.

NOTE: The drop down list for address type contains the following choices:

Summer	Current Mailing	Previous Mailing
Temporary	Residential	Transitional
Permanent Supportive	Emergency	Last Permanent

The screenshot shows the 'Add Address' screen in the TrackOne web application. The left navigation panel is expanded to show the 'Add Address' link under the 'Case Management' section. The main content area displays the 'Add Address' form for client 'Mantle, Mickey'. It includes a 'Client Address' section with a 'Select an Address Type' dropdown menu, and input fields for 'Address', 'Zip Code', 'City', 'State', 'Telephone', 'Begin Date', and 'End Date'. Below the form is a 'Restrictions' section with radio buttons for 'Restrict to Organization', 'Restrict to User', and 'Unrestricted'. The 'Unrestricted' option is selected. Buttons for 'Save', 'Pause', and 'Cancel' are at the bottom right.

TAA & TrackOne Address History

Clicking the “Address Report” button will generate a report as seen below in the screen shot.

The screenshot shows a web browser window with the address <https://www.trackone-in.com> - ClientTrack Reports - Microsoft Internet Explorer. The page displays the ClientTrack.net logo and the title "Client Address History Report". The report is for Client ID & Name: 55813 Hamilton, Delemechia, Social Security #: 314-86-9179. The current address is 1635 W 19 St, Anderson, IN 46016. The report includes a table with one row of address history.

ClientTrack.net
Empowering organizations with integrated application solutions

Client Address History Report
March 16, 2007
7:41:14AM
Greg Richmond

Client ID & Name: 55813 Hamilton, Delemechia Social Security #: 314-86-9179
Current Address: 1635 W 19 St
Anderson, IN 46016

Address Type	Prior Address	Home Phone #	Begin Date	End Date	Date Created
Current Mailing	1635 W 19 St Anderson, IN 46016	765-640-4154	02/11/2007		02/11/2007

TAA & TrackOne Interested Others

The "Interested Other" screens are where you can list emergency contacts for your client or other contacts for the client that may be beneficial.



TAA & TrackOne Interested Others

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Mantle, Mickey
000-00-0007
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Day Planner
- Calendar
- Edit Participant
 - Address History
 - Interested Others**
 - Case Managers
 - Notifications
 - Demographics Report
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms
 - TAA Waiver
 - TAA Job Search
 - TAA Relocation
 - TAA Training

Administration

Interested Others

Others who might have an interest in the client's situation display below. To view or edit a record displaying in the list, click **Edit** on the record you want to change. To add a new interested other for the client, click the **Add New** button.

[Add New](#) [Cancel](#)

0 records found.

Name	Phone
------	-------

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Mantle, Mickey
000-00-0007
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Case Management

- Client Home Page
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- TAA Forms
 - TAA Waiver
 - TAA Job Search
 - TAA Relocation
 - TAA Training

Administration

Interested Others & Emergency Contacts

An interested other and emergency contacts are individuals who has an interest or important association with the client. This information can be used to contact those individuals, especially in case of emergency. Examples of interested others include, family members, friends, doctors, employers, etc. Fill out the required information below. When you've completed the form, click **Save**.

Contact Name: *

Address Information-Enter the address information below

Address:

Address 2:

Zip Code:

City:

State:

Contact Information-Enter contact information below.

Home Phone: *

Office Phone:

Alt. Phone #:

Alt Phone Type:

E-mail Address:

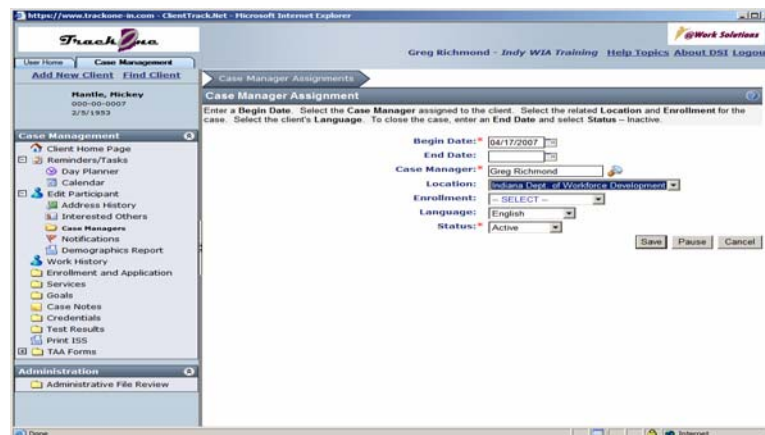
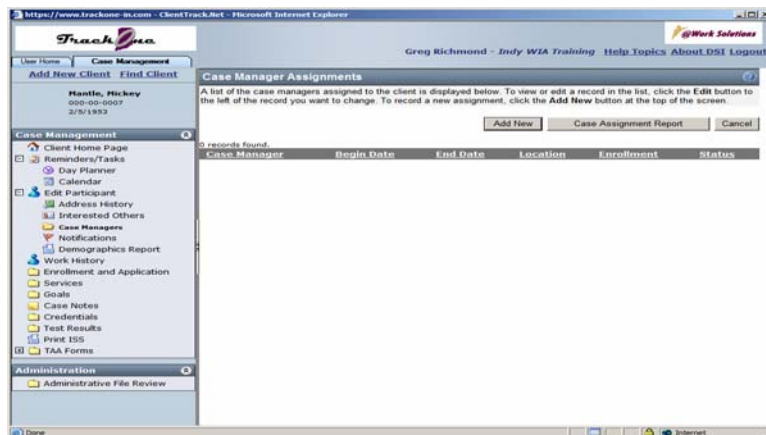
[Save](#) [Pause](#) [Cancel](#)

TAA & TrackOne Case Managers

This screen allows you to assign yourself or others as the case manager for the client record.

It is required that you assign yourself as the case manager for all active cases on your caseload. This will allow you to receive any alerts generated by the system for each of your assigned clients. Additionally, it allows you to generate reports that accurately depict your workload and allows your supervisor to monitor your progress.

NOTE: Supervisors can add themselves as a case manager to each of your client files in order to obtain alerts. This is not required by state policy, but may be required under local office policy.



TAA & TrackOne Notifications

Notifications are designed to allow the Case Manager to send him/herself reminders, as needed.

From this screen, you can add a notification or edit to an existing one. To add a notification, click the “Add Button.”

Select the type of notification: Violence, No Contact, or General.

Next, select the urgency level of the notification: Urgent, Normal or Non Urgent.

The exclamation points are color coded depending on the urgency you assigned.

Urgent is **Red**

Normal is **Yellow**

Non-Urgent is **Green**

Date Added: The default is today's date, but it can be changed. You can delete the date and type in the date you need or you can click the calendar icon and select the date you need from the calendar and it will fill the date box.*

User's name: Note the magnifying glass next to the name. If the wrong Case Manager is listed, you click the magnifying glass to see a list of case managers. Click on the correct Case Manager to select that person.

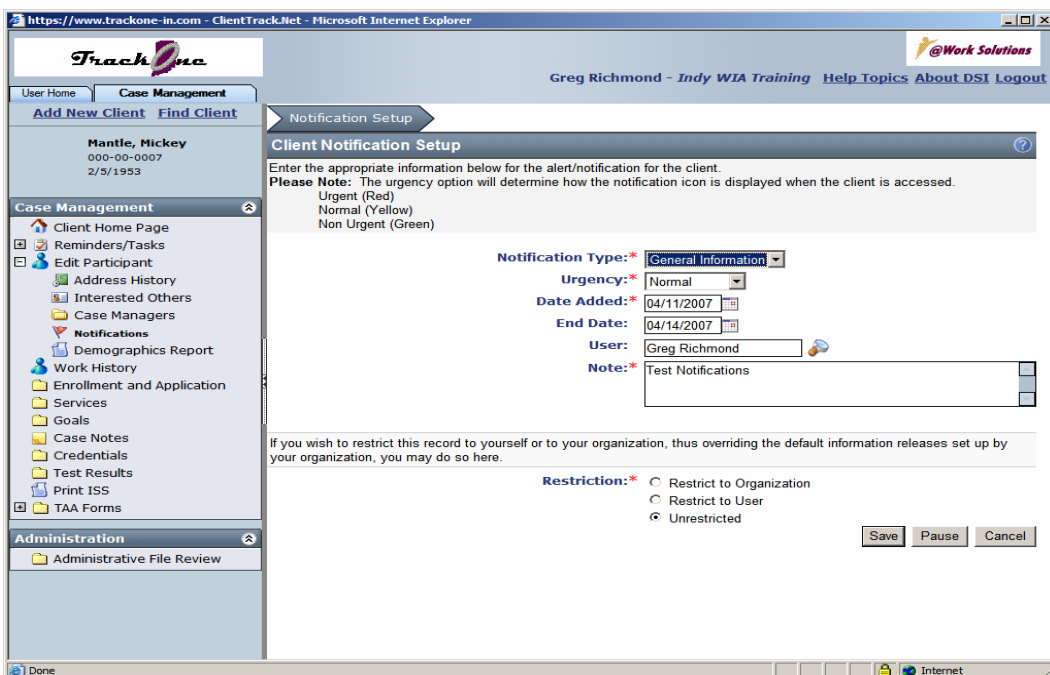
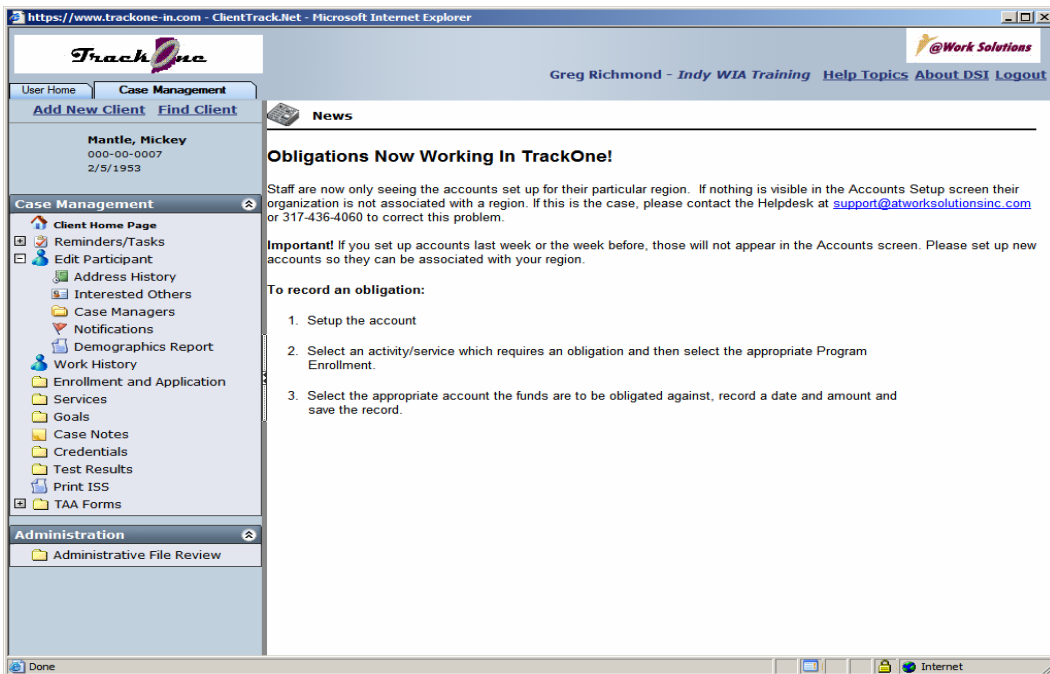
Note Text Box: Enter a concise explanation of the notice and its purpose.

Restriction: Select if you want to restrict this notification to your organization, yourself, or unrestricted.

The next time you open a case that has had a notification added, you will see an exclamation point to the right of the client's name on the navigation panel.

To edit a notification, click on the icon to left of notification listed in the working pane.

TAA & TrackOne Notifications




TAA & TrackOne Demographics

The Demographics Report is a printable report showing the demographic information for your participant.

The Demographics Report can be used as a file face sheet, if desired.

https://www.trackone-in.com - ClientTrack Reports - Microsoft Internet Explorer

1 / 1 Main Report 100% BusinessObjects View Log



Client Demographics Report

4/17/2007

<u>Name</u>	Mantle, Mickey	<u>Address</u>			
<u>SSN</u>	000-00-0007		309 West Washington		
<u>Gender</u>	Male		Indianapolis	IN	46204
<u>Birthdate</u>	02/05/1953	<u>Contact Information</u>			
<u>Ethnicity</u>		<u>Home Phone</u>			
<u>White</u>	<input checked="" type="checkbox"/>	<u>Work Phone</u>			
<u>Black</u>	<input type="checkbox"/>	<u>Email</u>			
<u>Hispanic</u>	<input type="checkbox"/>	<u>Demographics</u>			
<u>Asian</u>	<input type="checkbox"/>	<u>Veteran Status</u>	Yes, more than 180 days		
<u>American Indian</u>	<input type="checkbox"/>	<u>Highest Grade</u>			
<u>Pacific Islander</u>	<input type="checkbox"/>	<u>Employment Status</u>	Not Employed		
		<u>Citizenship</u>			

Client Contacts

<u>Name</u>	<u>Phone</u>
-------------	--------------

Case Managers

<u>Case Mgr Name</u>	<u>Begin Date</u>	<u>End Date</u>
----------------------	-------------------	-----------------

Internet

TAA & TrackOne

Entering A Core Service

Once you have entered your client's primary information, you need to record the fact that you have provided a core service, the TAA orientation. On the Navigation pane, click the "Services" link. That will open the "Services" pane. Click the "Add New" button to open the "Activities / Services" screen.

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Add New Client End Client

Howard, Elton 500-00-0032 2/5/1993

Activities

The client's activities/services are displayed below. The most recent items are listed first. To add a new activity, click the Add New button. To edit an existing activity, click the Action icon next to the desired record and select Edit from the menu.

Add New Cancel

0 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
------------	-------	----------------	--------------	-----------	------------------	-----------------

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Add New Client End Client

Howard, Elton 500-00-0032 2/5/1993

Activity

To add an activity, enter the following information.

Begin Date: 04/19/2007

Activity/Service Title:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

Summary Description:

Status: Active

Planned End Date: 04/19/2007

Actual End Date:

Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Click the magnifying glass to the right of the 'Activities / Services' text box. This will open the "Available Services by Funding Stream." There are a variety of search options. Since you know your service title is TAA Orientation, select that option. A list of services with TAA Orientation in the title will open.

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Add New Client End Client

Howard, Elton 500-00-0032 2/5/1993

Available Services By Funding Stream

Select the Funding Stream (only the ones for which this client is currently eligible are shown), and click Search to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: -SELECT-

Category: -SELECT-

Service Type: -SELECT-

Service Title: Partner Service - Veterans Programs (DOL funded)
Partner Service - Vocational Educ. (Carl Perkins)
Partner Service - Vocational Rehabilitation
Partner Service - Wagner-Peyser
Partner Service - Welfare-to-Work Participation
Skill Upgrade and Outcomes
TAA - Orientation
Training by Private Sector
Transportation Assistance
Work Keys Referral
Workforce Information Service

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Add New Client End Client

Howard, Elton 500-00-0032 2/5/1993

Available Services By Funding Stream

Select the Funding Stream (only the ones for which this client is currently eligible are shown), and click Search to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: -SELECT-

Category: -SELECT-

Service Type: TAA - Orientation

Service Title:

Search Cancel

4 records found.

Funding Stream	Service Type	Service Title	Line Code
Core Services	TAA - Orientation	TAA - Orientation	
Core Services	TAA - Orientation	Next-Step Session	
Core Services	TAA - Orientation	Orientation Session	
Core Services	TAA - Orientation	Worker Notification	

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

TAA & TrackOne Entering A Core Service

Selecting the TAA Orientation service will take you back to the activity screen. Click the down list arrow on the funding stream and select core services. Next, fill in the rest of the required fields. You may choose to enter a brief service note; however, this is not required. Click the save button.

NOTE: Service notes do not replace the need to write a detailed case note.

The screenshot shows the TrackOne ClientTrack.Net web application in Microsoft Internet Explorer. The browser address bar displays "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The page header includes the TrackOne logo, a user name "Greg Richmond - Indy WIA Training", and links for "Help Topics", "About DSI", and "Logout".

The left sidebar contains navigation menus for "Case Management" and "Administration". Under "Case Management", there are links for "Add New Client", "Find Client", "Client Home Page", "Reminders/Tasks", "Edit Participant", "Work History", "Enrollment and Application", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", and "TAA Forms". Under "Administration", there is a link for "Administrative File Review".

The main content area is titled "Activity" and contains the following fields:

- Begin Date: 04/19/2007
- Activity/Service Title: TAA - Orientation
- Funding Stream: -- SELECT -- (dropdown menu)
- Line Code: -- SELECT -- (dropdown menu)
- Service Type: Core Services (dropdown menu)
- Provider: Indiana WorkOne System
- Training Provider ID: (text field)
- O*Net Code: (text field)
- Summary Description: (text area)
- Status: Active (dropdown menu)
- Planned End Date: 04/19/2007
- Actual End Date: (text field)
- Record Created By: (text field)

Below the form fields, there is a "Service Notes" section with a text area and a "Historical Data" section with a text area. The "O*Net Code (read-only)" field is also visible at the bottom.

Clicking "Save" returns you to the "Activity" summary screen.

TAA & TrackOne

Entering A Work History Record

As with CS3, a complete and accurate work history is critical to successfully working with your client. It allows you to get a glimpse of their skill, experience, and may yield insight into potential barriers to future employment.

Completing the work history screens at this stage will allow information to carry over in to the application screens should you need to complete them. Therefore, it is recommended that case managers complete the work history screens prior to the application screens to save time during the application stage.

The steps for completing the work history screens are as follows:

- Click the work history link.
- Click “Add New.”
- You will need to check to see if the employer is already in the system. When the dialog box opens, type in the employer’s name.
- Click “Next” or click on the magnifying glass. An employer search dialog box will open.
- Type in all the information you have on the employer into the appropriate fields.

NOTE: The employer’s tax identification number is the FEIN.

- Click “Search”; a list of matching employers will appear below the dialog box. If your employer is not listed, click the “Add” button.
- Click “Next”. Complete as many of the fields as possible. The following fields have an asterisk and are required:

Hourly Wage

Average Weekly Hours

Job Start Date

Classification

Placement Type





- Click the “Finish” button to save the record.

TAA & TrackOne

Entering A Work History Record

The screenshot displays the 'FrackZone' application interface. At the top, the browser address bar shows 'https://www.frackzone.us/Client/TrackNet/'. The page header includes the 'FrackZone' logo, a 'Case Management' tab, and a user profile for 'Greg Richmond' with roles 'Judy WMA Training' and 'Help Topics Admin'. A 'Logout' link is also present.

The main content area is titled 'Client Work History'. It contains a message: 'The client's current and prior work history information displays below. To add a new work history record, click [Add New](#). To edit or view an existing record, click [Action](#) on the left of the record you want to change, and then click [Edit](#). To view the work history journal for a specific employment record, click [Action](#), then [View Journal](#).' Below this message is a table with the following data:


Employer	Start Date	End Date	Job Title	Wages
   	4/1/2001			22.50

The left sidebar contains a navigation menu with the following sections:

- Case Management**
 - Client Home Page
 - Reminders/Tasks
 - Full Participant
 - Address History
 - Interested Others
 - Case Managers
 - Notifications
 - Demographics Report
- Work History**
 - Enrollment and Application
 - Services
 - Quota
 - Case Notes
 - Order/Refills
 - Yield Results
 - Print DS
 - TAA Forms
- Administration**
 - Administrative File Review

The bottom of the page features a 'Done' button and a status bar with icons for 'Print' and 'Internet'.

https://www.trackman.com - ClientTrackNet - Microsoft Internet Explorer

TrackMan  @Work Solutions

Greg Richmond - Study WIA Training Help Topics About DSJ Logout

Home Case Management Add New Client Find Client

Case Management

Heath, Mickey
604-616-8997
2/17/2012

TrackMan Work History

Case 2 Case 3

Work History - Employer Info

Monthly, the current or past employer for the client by typing in the employer information or selecting a local employer using the lookup.

Employer Name:

Address:

Zip Code:

City:

State:

Phone:

Case Management

- Client Home Page
- Reminders/Tasks
- File Participant
- Address History
- Interested Others
- Case Managers
- Notifications
- Demographics Report

Work History

- Enrollment and Application
- Services
- Incidents
- Case Notes
- Credentials
- Test Results
- Print DSJ
- TMA Forms

Administrative

- Administrative File Review

Done

The screenshot displays the TrackBack application window. The top menu bar includes 'File', 'Edit', 'View', 'Case Management', 'Add New Client', and 'Find Client'. The 'Case Management' menu is open, showing options like 'Client Home Page', 'Reminders/Tasks', 'Edit Participant', 'Address History', 'Interested Others', 'Case Managers', 'Notifications', 'Demographics Report', 'Work History', 'Enrollment and Application', 'Services', 'Credits', 'Case Notes', 'Credententials', 'Test Results', 'Print DSS', and 'TAA Forms'. The 'Work History' option is selected, leading to a 'Work History - Employer Info' window. This window shows a search for 'Hassle, Mickey' with a date range of '3/7/1982'. The search results are displayed in a table with columns for 'Employer', 'Zip Code', 'Tax ID', 'Address', 'Phone', 'City', and 'State'. The results show 'Hassle, Mickey' with a zip code of '10001' and a city of 'New York'. The 'Find Employer' window is also visible, showing the search criteria and the search results.

https://www.buissness.com/Client/Account/FindEmployer/

Find Employer

Use the selection criteria below to find the desired employer.

Add New

Employer:

Zip Code:

Tax ID:

Address:

Phone:

City:

State:

Search

Cancel

Employer	Rolls Code	Tax ID	Address	Phone	City	State
Rolls-Royce	46141-1			317-220-4434	Indianapolis	IN
Rolls Royce	46142-2				Indianapolis	IN
Rolls Royce	46123				Indianapolis	IN
Rolls-Royce Performance		119401		317-220-6444		
ROLLS ROYCE ALLISON	132			317-220-3600		
ROLLS ROYCE CORP	788			317-220-2963		
ROLLS ROYCE CORP	437			317-220-4576		
ROLLS ROYCE CORP	5396			317-220-3600		
ROLLS ROYCE CORP	5650			317-220-4843		
ROLLS ROYCE CORP	5778			317-220-3600		
ROLLS ROYCE CORP	8723			317-220-3000		
ROLLS ROYCE CORP	8827			317-220-3600		
ROLLS ROYCE CORPORATION	7845			317-220-2000		
ROLLS ROYCE CORPORATION	46106	28847		317-220-2000	IN	IN
ROLLS ROYCE NORTH AMERICA	46141	13752		317-220-2000	IN	IN
ROLLS ROYCE TRAINING CNT	46179	28614		317-220-2000	IN	IN
Rolls-Royce Corp		62179				
Rolls-Royce Corporation	46166	5351 N. 79th Street		317-871-6540	Indianapolis	IN

http://www.trackman.com - ClientTrackMan - Microsoft Internet Explorer

TrackMan *Real Time*

Greg Richmond - Judy WIA Training Help Topics About DS Logout

Home Case Management Add New Client Find Client

Noodle, Mickey
DOB: 01/01/1957
1/19/1953

Job History - Job Information

Fill in the information below regarding the client's job. The wage information is based on the wage the client was receiving at the time they started the job.

Client Management

- Client Name Page
- Reminders/Tasks
- Bill Participant
- Address History
- Interested Others
- Case Managers
- Institutions
- Demographics Report

Work History

- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Test DS
- TIA Forms

Administrative

- Administrative File Review

Hourly Wages:

Average Weekly Hours: 40.00

Job Title:

Description:

Duties/Responsibilities:

Job Start Date:

Job End Date:

Reason Left:

Classification:

Contact Name:

Contact Phone:

Placement Type:

Benefits Available:

Job Covered by UI:

OPMNET Code:

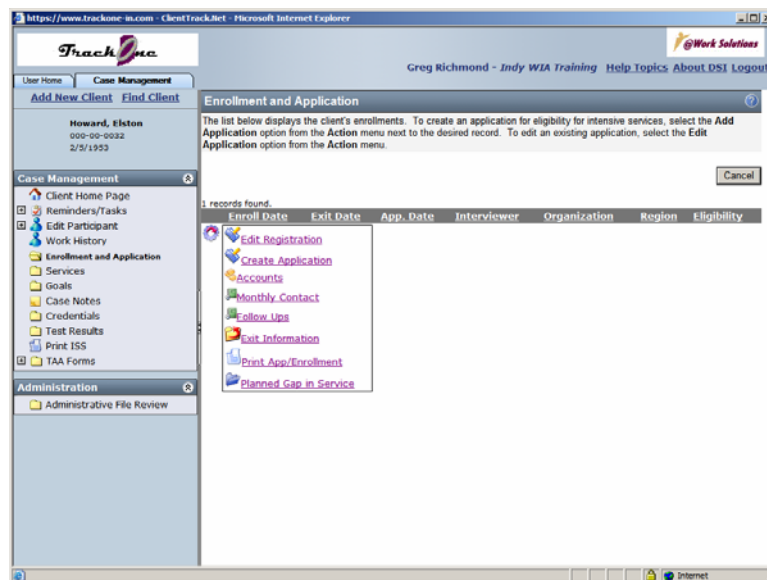
Non-Traditional Employment:

Job Related to Training:

Printed: 1/19/2001 10:00 AM

TAA & TrackOne Application

Up to now we have entered the minimum required information about our participant to be able to record a core service. The TAA Orientation is a core service; therefore, the participant has not been enrolled into the program. The TAA “Next Steps” meeting is a “significant staff involved” service. In order to enter this service record, we need to complete an application for the participant. Click the Enrollment/Application link on the navigation pane. Click on the gear icon. This opens a drop down menu. Read the selections carefully. Since our participant is new, select the “Create an Application” link.



There are five parts to the application process:

- 1.) Applicant Information
- 2.) Employment Information
- 3.) Other Client Information
- 4.) Barriers
- 5.) Eligibility determination

TAA & TrackOne Application

The first thing you will notice on the applicant information screen is the information that carried over from the “Add New Client” screens. You should complete as many of the fields as possible. These screens are designed to provide a formal eligibility determination, therefore, we will need our participants to provide documentation for some of the fields. Below the fields requiring documentation, you will notice a “Documented By” field. Notice the drop down list arrow at the right of the “Documented By” text box. Click on this arrow to see a list of acceptable documents and select the one that represents the documentation provided by the participant.

TIP: To ensure that clients have the required documentation on hand during the eligibility appointment, we suggest that the participant receive a handout describing the required documentation prior to the appointment.

The fields that require documentation are:

Date of Birth	Social Security Number	Citizenship	Selective Service
<div> -- SELECT -- Baptismal Record Birth Certificate DD-214, Report of Transfer or Discharge Paper Driver's License Federal, State or Local Government ID Card Hospital or Birth Record Passport Public Assistance/Social Service Records School Records/ID Card Work Permit </div>	<div> -- SELECT -- DD-214, Report of Transfer or Discharge Unemployment Insurance Wage Records Employment Records IRS Form Letter 1722 Letter from Social Services Agency Pay Stub Social Security Benefits Social Security Card W-2 Form Self-Verification </div>	<div> -- SELECT -- Birth Certificate Alien Registration Card US Passport Acceptable I-9 Documentation Public Assistance Records DD-214, Report of Transfer or Discharge with Place of Birth ... Food Stamp Records Foreign Passport Stamped Eligible to Work Hospital Record of Birth Native American Tribal Document Naturalization Certification Baptismal Record with Place of Birth Shown Department of Corrections Record Indicating Citizenship </div>	<div> -- SELECT -- Acknowledgement Letter Contact Selective Service DD-214, Report of Transfer or Discharge Local/State Registration Process Selective Service Advisory Opinion Letter Selective Service Registration Card Selective Service Registration (Form 3A) Selective Service Verification Form Stamped Post Office Receipt of Registration </div>

TAA & TrackOne Application

The next section of the application is the “Employment Information” section. This section is for completing the pertinent information about the participant’s most recent job. If you have already completed the Work History screens, the information will carry over.

TIP: It is important to keep the Work History screens up to date. This will allow work history information to carry over to application screens and helps in capturing supplemental data.

The screenshot shows the TrackOne application interface in a Microsoft Internet Explorer browser window. The URL is <https://www.trackone-in.com - ClientTrack.Net>. The user is logged in as Greg Richmond - Indy WIA Training. The interface has a sidebar with navigation links like 'User Home', 'Case Management', 'Add New Client', 'Find Client', 'Case Management', 'Client Home Page', 'Reminders/Tasks', 'Edit Participant', 'Address History', 'Interested Others', 'Case Managers', 'Notifications', 'Demographics Report', 'Work History', 'Employment and Application Services', 'Goals', 'Case Notes', 'Credentials', 'Test Results', 'Print ISS', 'TAA Forms', and 'Administration'. The main content area is titled 'Application - Employment Information'. It contains several sections: 'Employment/Dislocation Information' with instructions, 'Most Recent Job History' (a dropdown menu), 'Current Employment Status' (a dropdown menu with 'Employed, but Received Notice of Termination of Employment' selected), 'Dislocated Worker Category' (radio buttons for 'Not Applicable', 'Terminated/Laid Off', 'Received Notice of Substantial Layoff/Plant Closure', 'Was Self-Employed', and 'Displaced Homemaker'), 'Laid Off from TAA-Certified Employer' (checkbox), 'Employer Location' (text field with 'Indianapolis'), 'TAA Petition Number' (text field with '57829'), 'If Dislocated, Describe the Circumstances' (text field with 'Company Closed due to foreign competition'), 'Unemployment Insurance' (dropdown menu with 'Claimant - Not Profiled & Referred'), 'Application - Other Client Information' with 'Family Status' (dropdown menu with 'Parent in two-parent family'), and 'Family Income' section with 'Number In Family' (text field), 'Family Income for previous 6 Months' (text field), 'Homeless' (checkbox), 'Foster Child' (checkbox), 'Food Stamps' (checkbox), and 'TANF' (checkbox).

Click the down list arrow to the right of “Current Employment Status.” The drop down list gives you several choices. Click the most accurate choice.

This screenshot is similar to the previous one, but the 'Current Employment Status' dropdown menu is open, showing the following options: 'Not employed', 'Employed, but Received Notice of Termination of Employment', 'Was Self-Employed, Lost Work Due to Economic Conditions/Disaster', and 'Displaced Homemaker'. The 'Employed, but Received Notice of Termination of Employment' option is highlighted. The rest of the form and sidebar are the same as in the previous screenshot.

TAA & TrackOne Application

TAA participants by definition are “dislocated workers.” Select the appropriate dislocated worker category from the selection options. Notice the text box when a dislocated worker category is selected. Type a concise description of the dislocation.

The screenshot shows the 'Application - Employment Information' section of the TrackOne application. The 'Dislocated Worker Category' dropdown menu is open, showing several options. The 'If Dislocated, Describe the Circumstances' text box is highlighted with a red rectangle. The 'Unemployment Insurance' dropdown menu is also visible below it.

This screenshot shows the same application form as the previous one, but the 'If Dislocated, Describe the Circumstances' text box now contains the text 'Company Closed due to foreign competition'. The 'Unemployment Insurance' dropdown menu is still visible below it.

Click the down list arrow to the right of the “Unemployment Insurance” field and select the appropriate response.

The screenshot shows the 'Application - Employment Information' section of the TrackOne application. The 'Unemployment Insurance' dropdown menu is open, showing several options. The 'Dislocated - Not Profited & Referred' option is selected. The 'If Dislocated, Describe the Circumstances' text box is still visible above it.

This screenshot shows the same application form as the previous one, but the 'Unemployment Insurance' dropdown menu is now closed, and the 'Dislocated - Not Profited & Referred' option is selected. The 'If Dislocated, Describe the Circumstances' text box is still visible above it.

TAA & TrackOne Application

Scroll down to the next section of the application “Other Client Information.” The concept of “No wrong door” is important in achieving premier customer service. While some of this information is not required by the TAA program, it is information critical to our clients receiving all of the services they need to succeed. Our clients do not care about funding sources nor should they. Therefore, it is expected that TAA Coordinators make a concerted effort to capture information on behalf of the other Workforce Development Programs and that the other programs capture information on behalf of TAA.

The screenshot shows the TrackOne application interface. The left sidebar contains navigation links: User Home, Case Management, Add New Client, Find Client, Case Management, Client Home Page, Reminders/Tasks, Edit Participant, Work History, Enrollment and Application, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, and TAA Forms. The main content area is titled 'Application - Other Client Information' and contains the following fields:

- Family Status:** A dropdown menu with a 'SELECT' button.
- Family Income:** A section with a note: 'Family Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.' It includes a 'Number In Family' field and a 'Family Income for previous 6 Months' field.
- Education Status:** A section with a note: 'Education Information-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.' It includes a 'Highest Grade Completed' dropdown menu.
- Veteran Status:** A section with a note: 'Veteran Information-Indicate the applicant's veteran status by completing the following information.' It includes a 'Veteran Status' dropdown menu.
- Application - Barriers:** A section at the bottom of the form.

The next few fields related to family status and income are necessary for those programs that require an income eligibility determination. It is important that this information is captured at the time of application.

This screenshot is similar to the previous one, but the 'Family Status' dropdown menu is open, showing the following options: 'Parent in one-parent family', 'Parent in two-parent family', 'Other family member', 'Not a family member', and 'Not reported'. The rest of the form fields and navigation links are the same as in the previous screenshot.

TAA & TrackOne Application

The computer automatically annualizes the family income, therefore, it is important to only record the six (6) month income as required on the screen.

The next section of “Other Information” is the Education section. The Education Status field is for WIA youth.

TrackOne
Greg Richmond - Indy WIA Training Help Topics About DSI Logout

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000-00-0032
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Application - Other Client Information

Family Status: Parent in two-parent family

Family Income-Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.

Number In Family:
Family Income for previous 6 Months:
Homeless: False
Foster Child: False
Food Stamps: TANF: False
General Assistance: False
Refugee Cash Assistance: False
SSI-SVA Title XVI: False
Low Income: False

Education Information-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.

Education Status (Required for Youth Only): - SELECT -
Highest Grade Completed: Bachelors Degree or Equivalent

Veteran Information-Indicate the applicant's veteran status by completing the following information

Veteran Status: - SELECT -

Application - Barriers

The Highest Grade Completed field is a mandatory item. Click the drop down list arrow and select the highest grade **Completed**, not attended.

TrackOne
Greg Richmond - Indy WIA Training Help Topics About DSI Logout

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Application - Other Client Information

Family Status: Parent in two-parent family

Family Income-Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.

Number In Family:
Family Income for previous 6 Months:
Homeless: False
Foster Child: False
Food Stamps: TANF: False
General Assistance: - SELECT -
Refugee Cash Assistance: - SELECT -
SSI-SVA Title XVI: - SELECT -
Low Income: - SELECT -

Education Information-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.

Education Status (Required for Youth Only): - SELECT -
Highest Grade Completed: - SELECT -

Veteran Information-Indicate the applicant's veteran status by completing the following information

Veteran Status: - SELECT -

Application - Barriers

TrackOne
Greg Richmond - Indy WIA Training Help Topics About DSI Logout

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Application - Other Client Information

Family Status: Parent in two-parent family

Family Income-Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.

Number In Family:
Family Income for previous 6 Months:
Homeless: False
Foster Child: False
Food Stamps: TANF: False
General Assistance: False
Refugee Cash Assistance: False
SSI-SVA Title XVI: False
Low Income: False

Education Information-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.

Education Status (Required for Youth Only): - SELECT -
Highest Grade Completed: Bachelors Degree or Equivalent

Veteran Information-Indicate the applicant's veteran status by completing the following information

Veteran Status: - SELECT -

Application - Barriers

TAA & TrackOne Application

The last section of “Other Client Information” is Veteran Status. Veterans Preference is mandated for both the Wagner-Peyser and WIA programs. Collecting data on the veterans we serve is required and important. Click the down list arrow to the right of “Veteran Status” and choose the most accurate item.

Notice, after selecting a yes answer, several more required fields open. Click the down list arrow for “Disabled Veteran.”

NOTE: A Disabled Veteran has a VA (Veterans Administration) rated disability. Disabilities are rated in percent ages ranging from 0% to 100% and are granted in increments of 10%. A Special Disabled Veteran has a rating of 30% or higher. Select the appropriate item from the list.

TAA & TrackOne Application

Campaign Veteran is the next required field. Campaigns usually indicate service in a conflict or war. This information is located on the discharge form DD-214. Click the down list arrow and choose the appropriate response.

NOTE: Please consult the data dictionary for information on capturing campaigns.

TrackOne
Greg Richmond - Indy WIA Training Help Topics About DS1 Logout

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Veteran Information-Indicate the applicant's veteran status by completing the following information

Veteran Status: Yes - Served more than 180 days
Disabled Veteran: Yes
Campaign Veteran: SELECT
Recently Discharged Veteran: SELECT
Separation Date: Yes, Vietnam Era
Yes, Other Campaign
No

Application - Barriers

Disabled: No
Limited English: ☐
Substance Abuse: ☐
Poor Work History: ☐
TANF Exhaustee: ☐
Basic Skill Deficient: ☐
Offender: ☐
Pregnant/Parent Youth: ☐
Youth-Needs Assistance: False
Runaway: ☐
High School Dropout: ☐
Locally Defined Barrier: False
Local Barrier Description:

Application - Eligibility

Calculate Eligibility

A - Adult: ☒
B - Low Income Adult: ☐

TrackOne
Greg Richmond - Indy WIA Training Help Topics About DS1 Logout

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Veteran Information-Indicate the applicant's veteran status by completing the following information

Veteran Status: Yes - Served more than 180 days
Disabled Veteran: Yes
Campaign Veteran: No
Recently Discharged Veteran: ☐
Separation Date: 08/24/1986

Application - Barriers

Disabled: No
Limited English: ☐
Substance Abuse: ☐
Poor Work History: ☐
TANF Exhaustee: ☐
Basic Skill Deficient: ☐
Offender: ☐
Pregnant/Parent Youth: ☐
Youth-Needs Assistance: False
Runaway: ☐
High School Dropout: ☐
Locally Defined Barrier: False
Local Barrier Description:

Application - Eligibility

Calculate Eligibility

A - Adult: ☒
B - Low Income Adult: ☐

TAA & TrackOne Application

The barriers to employment screen is a formal barriers assessment. By completing this screen, you are providing the participant's first intensive service. This assessment is very important for the other programs that may provide services to the participant.

The screenshot displays the TrackOne application interface within a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://www.trackone-in.com> - ClientTrack.Net. The page header includes the TrackOne logo, the user name "Greg Richmond - Indy WIA Training", and links for "Help Topics", "About DSI", and "Logout".

The left sidebar contains navigation menus for "User Home", "Case Management", and "Administration". The "Case Management" menu is expanded, showing options like "Add New Client", "Find Client", "Client Home Page", "Reminders/Tasks", "Edit Participant", "Work History", "Enrollment and Application", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", and "TAA Forms".

The main content area is divided into two sections:

- Application - Barriers:** This section contains a list of barriers with checkboxes for selection:
 - Disabled*: No
 - Limited English: ☐
 - Substance Abuse: ☐
 - Poor Work History: ☐
 - TANF Exhaustee: ☐
 - Basic Skill Deficient: ☐
 - Offender: ☐
 - Pregnant/Parent Youth: ☐
 - Youth-Needs Assistance: False
 - Runaway: ☐
 - High School Dropout: ☐
 - Locally Defined Barrier: False
 - Local Barrier Description:
- Application - Eligibility:** This section contains a list of eligibility criteria with checkboxes:
 - A - Adult: ☒
 - B - Low Income Adult: ☐
 - D - Dislocated Worker: ☒
 - F - Youth (14 - 18): ☐
 - G - Youth (19 - 21): ☐
 - I - Youth (14 - 18) 5 Percent Window: ☐
 - J - Youth (19 - 21) 5 Percent Window: ☐
 - T - TAA: ☒

At the bottom of the eligibility section, there is a "Calculate Eligibility" button and a "Combined WIA Eligibility Code" field with the value "ADT".

TAA & TrackOne Application

Once all of the required and optional fields are completed to the best of your ability, click the “Calculate Eligibility” button and the system will auto-fill the checks in the boxes next to the programs for which the participant is eligible. Check the boxes closely; there should be checks in the TAA box, Dislocated Worker box, and either the Adult or the Older Youth box. If these checks are not present, then you need review the application carefully to locate erroneous or missing information.

The screenshot shows the TrackOne application form in a web browser. The left sidebar contains navigation links for Case Management and Administration. The main content area is titled "Application - Eligibility" and includes a "Calculate Eligibility" button. Below this button are several checkboxes for eligibility criteria: A - Adult, B - Low Income Adult, D - Dislocated Worker, F - Youth (14 - 18), G - Youth (19 - 21), I - Youth (14 - 18) 5 Percent Window, J - Youth (19 - 21) 5 Percent Window, and T - TAA. A "Combined WIA Eligibility Code" field is also present. At the bottom, there is a "Reviewer Information" section with fields for "Interviewer" (Greg Richmond) and "Interview Date" (04/19/2007).

If everything is correct, click the save button and you will be returned to the “Enrollment/Application” summary screen.

The screenshot shows the "Enrollment and Application" summary screen. It displays a table with 1 record found. The table has columns for "Enroll Date", "Exit Date", "App. Date", "Interviewer", "Organization", "Region", and "Eligibility". The record shows an enrollment for Greg Richmond on 04/19/2007, with the organization being the Indiana Dept. of Workforce Development. The region is listed as Adult, Disl Wer, and TAA. The eligibility is listed as TAA. A list of actions is available for this record, including Edit Registration, Edit Application, Accounts, Monthly Contact, Follow Up, Exit Information, Print App/Enrollment, and Planned Gap in Service.

Enroll Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
04/19/2007			Greg Richmond	Indiana Dept. of Workforce Development	Adult, Disl Wer, TAA	TAA

TAA & TrackOne

Edit a Registration

The “Registration” screen allows you to enter the participants’ programmatic information. You will want to ensure all the required information is there as well as add any missing or new information. There are six sections for you to review and edit if necessary.

TrackOne Registration

Enter the Planned Start and Exit Dates.

The actual Participation Date (the date of the first program-funded service or activity for this client), and the Last Service Date are calculated by the system. If ninety days have passed since the Last Service Date, the system will automatically exit the participant from the program.

Planned Start Date: * 04/11/2007

Enrollment Categories-Select the WIA funding streams used to serve this participant.

WIA Adult: ☐
 Dislocated Worker: ☐
 WIA Youth: ☐
 Rapid Response: ☐
 National Emergency Grant (NEG): ☐
 Trade Adjustment Act (TAA): ☒

Participation Dates-The first and last service dates are displayed below. If no services/activities occur for 90 days, the participant will be automatically exited as of the Last Service Date. If a Planned Gap in Service is in effect, no exit will occur before the Hold Open Until date shown below.

Participation Date: 4/11/2007
 Last Service Date: 4/11/2007
 Hold Open Until:
 Actual Exit Date:

TAA Tracking-This section for TAA program use ONLY.

TAA Application Date:
 TAA Petition #: 60394
 Company: Airtomic
 Location: Jeffersonville
 TAA Participant ID:
 Apply for ATAA Benefit Determination: ☒

ATAA Reemployment-Make sure appropriate verification documents have been mailed to DWD in regard to the employment listed below.

Reemployment Job for Benefit Determination:
 Eligible for ATAA: ☒
 Estimated Weekly Payment:

TAA Training Contract/Waiver

Training Waiver/Reason: Training does not begin for more than 60 days
 Training Program ID:
 Training Contract Review Date:
 Total Cost of Training:
 Total Expenses Paid by TAA:
 Total Travel Expenses Paid:
 Total Subsistence Expenses Paid:
 Total Other Expenses Paid:
 TAA Deregistration Notice:
 Other Federal Enrollment code:

TAA - Employment at Dislocation

Separation Date: 03/31/2007
 Annual Pay: \$30,000.00
 # of Months Employed: 26
 Recalled by Former Employer: ☐

Save Pause Cancel

TAA & TrackOne Edit a Registration

Planned Start Date: Enter the application date.

Enrollment Categories: Make sure that there is a check the TAA box .

Participation Dates: These are auto filled and show the first and last dates of services. Remember if 90 days pass without a service, the participant will be exited from the program unless they have been given a Planned Gap in Service.

TAA Tracking: Check that the TAA Application Date is accurate. If the participant is dually enrolled with WIA, the TAA and WIA application dates will be the same.

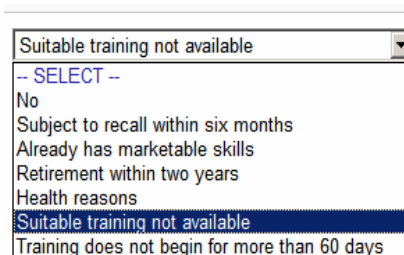
TAA Petition Number: Company name and location will auto fill.

TAA Participant ID: A unique identifier.

Apply for ATAA benefits: Box should be checked if the ATAA petition is approved and the participant is eligible. If the box is not checked then a Reason Not Eligible for ATAA drop down.

ATAA Reemployment: If employer is not listed click the drop, down list arrow and select the affected employer. The Estimated Weekly Payment will be filled in by the State ATAA Coordinator

TAA Training Contract/Waiver: If a Training Waiver exists, a list box will appear. Click the drop down arrow and select the reason.



The screenshot shows a web-based dropdown menu. The selected option in the dropdown is "Suitable training not available". The list of options includes: "-- SELECT --", "No", "Subject to recall within six months", "Already has marketable skills", "Retirement within two years", "Health reasons", "Suitable training not available" (highlighted), and "Training does not begin for more than 60 days".

TAA & TrackOne

Edit a Registration

Training Program ID: Assigned by State TAA Coordinator.

Training Contract Review Date: Assigned by State TAA Coordinator

Total Cost of Training: Enter value from Training Plan

Total Expenses Paid by TAA: Enter value from Training Plan

Total Subsistence Expenses Paid: Enter value.

TAA Deregistration: Check this box if a Deregistration form has been sent to the State TAA Coordinator.

TAA Employment at Dislocation:

Enter the date of separation from the affected employer.

Enter the participant's annual salary from this employer

Enter the number of months the participant worked for this employer.

The screenshot shows a web-based form titled "TAA - Employment at Dislocation". The form contains the following fields and controls:

- Separation Date:** A text box containing "03/31/2007" with a calendar icon to its right.
- Annual Pay:** A text box containing "\$30,000.00".
- # of Months Employed:** A text box containing "26".
- Recalled by Former Employer:** A checkbox that is currently unchecked.
- Buttons:** "Save", "Pause", and "Cancel" buttons are located at the bottom right of the form.
- Taskbar:** The Windows taskbar at the bottom shows the "Internet" icon.

Recalled by Former Employer: Check this box if participant is recalled to work by the affected employer.

TAA & TrackOne

Entering An Intensive Service

During the TAA orientation, a “Next Steps” session should be scheduled. The Next Steps session is designed to inform the participant, in greater detail, of the various TAA programs. If the participant is interested, a one-on-one interview will be scheduled to begin the process of enrolling the participant into the TAA programs.

The “Next Steps” meeting, the application/registration process and monitoring a participant’s progress in TAA programs are intensive services. Intensive services are those services that require a significant amount of staff involvement. In other words, the participant cannot perform these services without your assistance.

We entered a service record in detail when we entered a core service. The process is the same for an intensive service. If you need refreshing, see pages 33 and 34. Therefore, we will focus on identifying the steps and explaining the information required.

1. Click the services link located in the navigation panel on the left hand side.
2. Click add a service.
3. Click the drop down arrow next to the category field and select TAA services.
This will generate the list of TAA services in the next drop down box called service type.
4. Click the down arrow for the list of services and click (select) the service you are providing.
Once you have selected the service type the next screen is where you will enter the specific information regarding the activity.
 - Begin Date.
 - Service/Activity Title: Click the magnifying glass icon to see a list of titles; select the appropriate one.
 - Funding Stream: Select TAA.
 - Program Enrollment: Select the appropriate response.
 - Training Provider ID: Enter the providers ID when training is the service.
 - O*Net Occupational Code: Enter the appropriate code.
 - Summary Description: Type in a brief description of the activity.
 - Status: Select the appropriate response.
 - Planned End Date: Type in the date you anticipate the activity will end. You can also click the calendar icon and select the date from the calendar.
 - Actual End Date: This field is used to record the date the service actually ended.

TAA & TrackOne

Entering An Intensive Service

- Service Notes: A text box to enter justification, rationalization, or other detailed information pertinent to the activity.

NOTE: Service notes do not replace case notes. Service notes are not required. Case notes are required.

- Enter a Case Note.

TAA & TrackOne

Entering An Intensive Service

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home **Case Management** Greg Richmond - Indy WIA Training Help Topics About DSI Logout

[Add New Client](#) [Find Client](#)

Mantle, Mickey
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Activities

The client's activities/services are displayed below. The most recent items are listed first. To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

[Add New](#) [Cancel](#)

2 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
4/11/2007	TAA - Orientation	Core Services	TAA - Orientation		4/11/2007	
4/11/2007	TAA - ATAA (Alternative Trade Adjustment Assist.)	TAA	TAA - ATAA (Alternative Trade Adjustment Assist.)		4/11/2007	

Done

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User Home **Case Management** Greg Richmond - Indy WIA Training Help Topics About DSI Logout

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Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 04/18/2007

Activity/Service Title:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

Summary Description:

Status: Active

Planned End Date: 04/18/2007

Actual End Date:

Record Created By:

Service Notes

A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

[Save](#) [Pause](#) [Cancel](#)

TAA & TrackOne

Entering a Waiver

Using the same process we used for other services, enter a Waiver of Training.

- Open the participant's file.
- Click the Services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box, click the "Funding Stream" down list arrow; select TAA.
- Click the "Service Type" down list arrow, scroll down, and select "TAA - Waiver from Training."
- Click the "Search" button, the search will generate a list of services.
- Click the "TAA Waiver" item from the list.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box, type "Issued waiver from training."
- Click the down list arrow to the right of status; select active.
- Enter the "Planned End Date". This should be six months from the "Begin Date."
- Enter your justification for issuing the waiver in the "Service Notes" text box.
- Click the "Save" button.
- Add a case note.

TAA & TrackOne

Entering a Waiver

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User Home **Case Management**

[Add New Client](#) [Find Client](#)

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Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date:* 04/25/2007
Activity/Service Title:* TAA Training Waiver
Funding Stream:* TAA
Line Code:
Service Type: TAA - Waiver from Training
Provider: Indiana WorkOne System
Training Provider ID:
O*Net Code:
Summary Description: Issued a Waiver of Training
Status:* Active
Planned End Date:* 04/25/2007
Actual End Date: 10/25/2007
Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes: Participant has marketable skills.

Historical Data

O*Net Code (read-only):
Client Intake Site:
Provider Name:
Case Mgr Name:
Office Name:
WSA:
Total Hours:
Total Obligated:
Total Expended:
Created Date:

Save Pause Cancel

TAA & TrackOne Waiver Checks

The 28 day waiver check is a one day service; therefore, the begin date, planned end date and actual end date will be identical.

To enter a 28 day waiver check, complete the following steps.

- Open the participant's file.
- Click the Services link on the Navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select "TAA Training Waiver Review Session)" (28 day).
- Click the "Search" button, the search will generate a list of services.
- Click the "TAA Training Waiver Review Session (28 day)" item in the list. You will be automatically returned to the activity screen.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box, type "Issued Waiver from Training".
- Click the down list arrow to the right of "Status" and select Active.
- Enter the "Planned End Date". This should be the same as the "Begin Date".
- Click the down list arrow to the right of "Status" and select complete.
- Enter the "Planned End Date". This should be the same as the begin date.
- The "Actual End Date" will be the same as the Planned End Date.

TAA & TrackOne Waiver Checks

- Enter 28-day review of waiver in the Service Notes text box.
- Click the “Save” button.
- Add a case note.

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User Home **Case Management**

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Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 04/25/2007

Activity/Service Title: TAA Training Waiver Review Session (28 d)

Funding Stream: -- SELECT --

Line Code:

Service Type: TAA - Waiver Review Session (28 days)

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: Waiver Review

Status: Active

Planned End Date: 04/25/2007

Actual End Date:

Record Created By:

Service Notes: Waiver Reviewed

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

Save Pause Cancel

TAA & TrackOne Entering HCTC

HCTC is entered for participants that are eligible for the Health Coverage Tax Credit (HCTC). This is an “Intensive Service” and is entered in the same manner as other services.

To enter a TAA – HCTC (Health Coverage Tax Credit) use the following steps:

- Open the participant’s file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the “Add New” button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the “Available Services by Funding Stream” dialog box.
- In the dialog box, click the “Funding Stream” down list arrow and select TAA.
- Click the “Service Type” down list arrow and scroll down and select “TAA – HCTC (Health Coverage Tax Credit)”
- Click the “Search” button, the search will generate a list of services.
- Click the “TAA – HCTC (Health Coverage Tax Credit)” item in the list to select it and be automatically returned to the “Activity screen.
- Click the down list arrow to the right of the “Funding Stream”, select TAA.
- In the “Summary Description” box type “HCTC (Health Coverage Tax Credit)”.
- Click the down list arrow to the right of “Status” and select Active.
- Enter the “Planned End Date”; this should be the date the Waiver of Training ends.
- Leave the “Actual End Date” blank.
- Enter “Start HCTC” in the “Service Notes” text box.
- Click the “Save” button.
- Add a case note.

TAA & TrackOne Entering HCTC

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- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
 - Goals
 - Case Notes
 - Credentials
 - Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 04/25/2007

Activity/Service Title: TAA - HCTC (Health Coverage Tax Credit)

Funding Stream: TAA

Line Code:

Service Type: TAA - HCTC (Health Coverage Tax Credit)

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: HCTC (Health Coverage Tax Credit)

Status: Active

Planned End Date: 04/25/2007

Actual End Date:

Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes: HCTC (Health Coverage Tax Credit)

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

Save Pause Cancel

TAA & TrackOne

Developing & Entering a Training Plan

In order for a client to attend approved training, you must complete a training plan in TrackOne. This is important because the date of the training plan is used to determine if the participant meets the 210 day requirement for eligibility for TRAA.

Developing a training plan is an intensive service and will be entered using the same process we have used for other services. This is a one day service so the begin date, planned end date and actual end dates will be the same.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select TAA Occupational Skills Training.
- Click the "Search" button, the search will generate a list of services.
- Click the "TAA Training Plan Development Session" item on the list. You will automatically be returned to the activity screen.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box, type "Training plan developed & sent to State TAA Coordinator".
- Click the down list arrow to the right of "Status" and select completed.
- Enter the "Planned End Date". This should be the same as the begin date.
- The "Actual End Date" will be the same as the begin date and the planned end date.
- Enter your justification for the training plan in the "Service Notes" text box.
- Click the "Save" button.
- Add a case note that justifies the training plan.

TAA & TrackOne

Developing & Entering a Training Plan

Once the training plan has been developed, submitted and approved, you will need to enter the training service in to TrackOne.

A training service is an intensive service and will be entered using the same process we have used for other services.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select TAA Occupational Skills Training.
- Click the "Search" button, the search will generate a list of services.
- Click the "TAA Occupational Skills" service on the list. You will automatically be returned to the activity screen.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box, type "Occupational skills training."
- Click the down list arrow to the right of "Status" and select active.
- Enter the "Planned End Date". This should be the anticipated graduation date.
- The "Actual End Date" will be left blank at this time.
- Enter the type of training, total cost of training, the name of the training provider and the campus where the training will take place in the "Service Notes" text box.

TAA & TrackOne

Developing & Entering a Training Plan

- Click the “Save” button.
- Add a case note that justifies the training plan.

NOTE: The State TAA Coordinator will enter travel and subsistence allowances. The State TAA Coordinator will enter the training approval in to the case notes.

The screenshot displays the TrackOne web application in a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://www.trackone-in.com> - ClientTrack.Net. The page header includes the TrackOne logo and the user name "Greg Richmond - Indy WIA Training" with links for "Help Topics", "About DSI", and "Logout".

The left sidebar contains navigation menus for "User Home", "Case Management", and "Administration". Under "Case Management", there are links for "Add New Client" and "Find Client". Below these, a client profile for "Howard, Elston" is shown with ID "000-00-0032" and date "2/5/1953". The "Case Management" menu includes options like "Client Home Page", "Reminders/Tasks", "Edit Participant", "Work History", "Enrollment and Application", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", and "TAA Forms". The "Administration" menu includes "Administrative File Review".

The main content area displays the "Service Type: IAA - Occupational Skills Training" and "Provider: Indiana WorkOne System". The "Training Provider ID" is entered as "17-3023.01". The "Summary Description" is "Electronic Engineering". The "Status" is set to "Active". The "Planned End Date" is "05/03/2007" and the "Actual End Date" is "05/01/2009". The "Record Created By" field is empty.

Below the form fields, there is a "Service Notes" section with a text area containing the following text: "Associates Degree in Electronic Engineering", "Total Costs will be \$15,000.00", and "IVY Tech Community College Indianapolis Campus". A note above the text area states: "Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users."

The "Historical Data" section is currently empty. At the bottom right of the form, there are buttons for "Save", "Pause", and "Cancel". The browser's status bar at the bottom shows "Done" and "Internet".

TAA & TrackOne Revoking a Waiver

Occasionally, a case manager will find it necessary to revoke a “Waiver of Training”. To accomplish this, open the client’s file and click on the services link. Since the waiver already exists, you will not be adding a service but editing one. When you click the “Services” link, you should see a screen like the one on the next page. Notice there will be a list of the services and at the beginning of each service, there will be an icon that resembles a gear. Click the gear and a menu list will appear. Click edit in the menu list and that service screen will open. The following steps will be used to revoke the waiver:

- Select the waiver of training service; click on the gear icon. Click edit.
- Date Field: The date stays the date the waiver was issued.
- Service/Activity Title: Click on magnifying glass and select TAA services.
- Activity type: Select waiver from training.
- Funding Stream: TAA.
- Summary Description: Terminate/Revoked Waiver.
- Planned End Date: Update to be the date the waiver is revoked.
- Actual End Date: Update to be the date the waiver is revoked.
- Service Note: Give reason why the waiver was revoked.

NOTE: When you revoke a waiver for entering training or ATAA, you will need to edit the HCTC service (following the same steps as above except you select the HCTC Service) to change the HCTC end date to the same as the qualifying service’s end date. If you are revoking a waiver for non-compliance, change the HCTC end date to match the waiver’s end date. If you are unable to change these date due to prior ownership, contact your Master User.

Additionally, you will need to enter a Case Note stating the reason for revoking the waiver.

Last but not least, send the waiver revocation form to the State TAA Coordinator.

TAA & TrackOne Revoking a Waiver

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Maris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Activities

The client's activities/services are displayed below. The most recent items are listed first. To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

[Add New](#) [Cancel](#)

3 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
4/18/2007	TAA - Orientation	Core Services	TAA - Orientation		4/18/2007	
4/18/2007	TAA - Orientation	Core Services	TAA - Orientation		4/18/2007	
		AA	TAA - Waiver from Training		4/18/2007	

[Edit](#)
[Participation Hours](#)
[Obligations](#)
[Print Service](#)

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Maris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Activity/Service Information

Begin Date: 04/18/2007

Activity/Service Title: TAA Training Waiver

Funding Stream: TAA

Line Code:

Service Type: TAA - Waiver from Training

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: AA in EE

Status: Active

Planned End Date: SELECT -

Actual End Date: Active

Record Created By: Terminated/Revoked

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):

Client Intake Site: Indiana Dept. of Workforce Development

Provider Name:

Case Mgr Name:

Office Name:

TAA & TrackOne

Modifying A Training Plan

While training plans may be carefully developed, a participant's circumstances may change. As a result, training plans may need to change.

To accomplish this, open the participant's file and click on the services link. Since the training plan already exists, you will not be creating a new service record but editing the existing record. When you click on the "Services" link, notice the list of the services. Click the gear icon and a menu list will appear. Click edit in the menu list and that service screen will open.

The following steps are used to modify a training plan:

- Date Field: The date training starts change only if training start date changes.
- Service/Activity Title: Since we are modifying a training plan, this field does not change.
- Funding Stream: remains TAA.
- Summary Description: "Modified the Training Plan."
- Planned End Date: Enter the new anticipated graduation date if it has changed.
- Actual End Date: The date training is completed, if known.
- Service Note: Explain the modification in the training plan.
- Save the record.
- Enter a case note that documents the reason for the change.
- Send the modified training plan to the State TAA Coordinator.

TAA & TrackOne

Modifying a Training Plan

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Maris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
 - Goals
 - Case Notes
 - Credentials
 - Test Results
 - Print ISS
 - TAA Forms

Administration

- Administrative File Review

TAA - Customized Training - Generic

Activity

To add an activity, enter the following information.

Begin Date: 04/26/2007

Activity/Service Title: TAA - Customized Training - Generic

Funding Stream: TAA

Line Code:

Service Type: TAA - Customized Training

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: Modified the Training Plan

Status: Active

Planned End Date: 04/24/2009

Actual End Date:

Record Created By: Greg Richmond

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Participant switched from an Electronic Engineering Associates Degree to the LPN program.
Total Cost: \$15,000.00

Historical Data

O*Net Code (read-only):

Client Intake Site: Indiana Dept. of Workforce Development

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date: 4/26/2007

Save Pause Cancel

Done Internet

TAA & TrackOne

Entering TRA-B

NOTE: Before you enter the request to start Trade Readjustment Assistance—Basic (TRA-B). Verify that a waiver or a training plan has been completed.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select Request Basic TRA - Session.
- Click the "Search" button, the search will generate a list of services.
- Click the TAA - Basic TRA (Trade Readjustment Assistance).
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "TRA-B".
- Click the down list arrow to the right of "Status" and select active.
- Enter the "Planned End Date" — an estimate of the date TRA-B will end.
- The "Actual End Date" will be left blank for now. This field will eventually be updated to the date TRA-B ends
- Service Notes: Enter "Start TRA-B benefits".
- Click the "Save" button.

TAA & TrackOne

Entering TRA-B

- Send a request to start TRA-B to the Federal Claims Unit. Include documentation that the participant applied for training within the 210-day limit (a screen print of the training activity screen) and a copy of the case note with the State TAA Coordinator's approval.
- Enter a case note justifying the start of TRA-B.

NOTE: You will need to enter or extend the HCTC End Date

The screenshot shows the TrackOne ClientTrack.Net web application in a Microsoft Internet Explorer browser. The address bar displays the URL: https://www.trackone-in.com - ClientTrack.Net. The page header includes the TrackOne logo and the user's name, Greg Richmond - Indy WIA Training, along with links for Help Topics, About DSI, and Logout.

The left sidebar contains navigation menus for Case Management and Administration. The Case Management menu includes links for Add New Client, Find Client, Client Home Page, Reminders/Tasks, Edit Participant, Work History, Enrollment and Application, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, and TAA Forms. The Administration menu includes Administrative File Review.

The main content area is titled 'Indy WIA Activities' and 'Activity'. It prompts the user to 'To add an activity, enter the following information.' The form fields are as follows:

- Begin Date:** 04/26/2007
- Activity/Service Title:** Request Basic TRA - Session
- Funding Stream:** TAA
- Line Code:**
- Service Type:** TAA - Basic TRA (Trade Readjustment Assistance)
- Provider:** Indiana WorkOne System
- Training Provider ID:**
- O*Net Code:**
- Summary Description:** TRAB
- Status:** Active
- Planned End Date:** 04/26/2007
- Actual End Date:**
- Record Created By:**

Below the form fields, there is a section for 'Service Notes' with a text area containing 'Start TRAB benefits'. A note states: 'Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.'

At the bottom, there is a 'Historical Data' section with the following read-only fields:

- O*Net Code (read-only):
- Client Intake Site:
- Provider Name:
- Case Mgr Name:
- Office Name:
- WSA:
- Total Hours:
- Total Obligated:
- Total Expended:
- Created Date:

The bottom of the page features 'Save', 'Pause', and 'Cancel' buttons.

TAA & TrackOne Entering TRA-A

Before you enter a request to start Trade Readjustment Assistance - Additional (TRA-A), verify that a training plan has been completed. After completing this entry, submit the request to Federal Claims following standard protocol.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button; this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select "TAA - Additional TRA."
- Click the "Search" button, the search will generate a list of services.
- Click the TAA - Additional TRA Request Additional TRA
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "TRA-A."
- Click the down list arrow to the right of "Status" and select active.
- Enter the "Planned End Date" — the estimated end date for TRA-A.
- The "Actual End Date" will be left blank for now. It will eventually be updated to reflect the date TRA-A ends.
- Service Notes: Enter "Start TRA-A benefits."
- Click the "Save" button.

TAA & TrackOne

Entering TRA-A

- Submit a request for TRA-A benefits to the Federal Claims Unit following the standard protocol.
- Enter a case note.

NOTE: Make sure that you include the documentation that the person applied for training within 210 days of layoff or certification.

The screenshot displays the TrackOne web application interface within a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://www.trackone-in.com> - ClientTrack.Net. The page header includes the TrackOne logo and the user's name, Greg Richmond - Indy WIA Training, along with links for Help Topics, About DSI, and Logout.

The left sidebar contains navigation menus for Case Management and Administration. The Case Management menu includes links for Add New Client, Find Client, Client Home Page, Reminders/Tasks, Edit Participant, Work History, Enrollment and Application, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, and TAA Forms. The Administration menu includes Administrative File Review.

The main content area is titled 'Indy WIA Activities' and contains a form for adding a new activity. The form fields are as follows:

- Begin Date:** 04/26/2007
- Activity/Service Title:** Request Additional TRA - Session
- Funding Stream:** TAA
- Line Code:** TAA - Additional TRA (Trade Readjustment Assist.)
- Provider:** Indiana WorkOne System
- Training Provider ID:**
- O*Net Code:**
- Summary Description:** TRAA
- Status:** Active
- Planned End Date:** 04/26/2007
- Actual End Date:**
- Record Created By:**

Below the form fields is a section for **Service Notes**, which includes a text area for entering notes. A note is entered: 'Start TRAA benefits'. Below this is a section for **Historical Data**, which includes fields for O*Net Code (read-only), Client Intake Site, Provider Name, Case Mgr Name, Office Name, WSA, Total Hours, Total Obligated, Total Expended, and Created Date.

The bottom of the page features a 'Save' button, a 'Pause' button, and a 'Cancel' button. The status bar at the bottom shows 'Done' and 'Internet'.

TAA & TrackOne

Entering TRA-R

Before you enter a request to set-up Trade Readjustment Assistance—Remedial (TRA-R), verify that TRA-B and TRA-A service records have been entered with the correct start and end dates. The TRA-B and TRA-A end dates should be the last date the claimant received those benefits.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down; select "TAA - Remedial TRA."
- Click the "Search" button; the search will generate a list of services.
- Click the TAA - Remedial TRA Request Remedial TRA
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "TRA-R."
- Click the down list arrow to the right of "Status" and select active.
- Enter the "Planned End Date" — This is the earlier of the TRAR end date or the date school ends.
- The "Actual End Date" will be left blank for now. It will eventually be updated to the earlier of either the TRA-R end date or the date school ends.
- Service Notes: Enter "Start TRA-R benefits."
- Click the "Save" button.

TAA & TrackOne

Entering TRA-R

- Enter a case note justifying the start of TRA-R.
- Submit a request to start TRA-R benefits to the Federal Claims Unit following the standard protocol.

NOTE: Make sure that you include the documentation that the person applied for training within 210 days of layoff or certification.

The screenshot shows the TrackOne web application interface. The browser address bar displays "https://www.trackone-in.com - ClientTrackNet - Microsoft Internet Explorer". The page header includes the TrackOne logo and the user name "Greg Richmond - Indy WIA Training" with links for "Help Topics", "About DSI", and "Logout".

The left sidebar contains navigation menus for "User Home", "Case Management", and "Administration". Under "Case Management", there are links for "Add New Client", "Find Client", and a list of client-related actions: "Client Home Page", "Reminders/Tasks", "Edit Participant", "Work History", "Enrollment and Application", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", and "TAA Forms".

The main content area is titled "Indy WIA Activities" and "Activity". It contains a form for adding a new activity. The form fields include:

- Begin Date:** 04/26/2007
- Activity/Service Title:** Request Remedial TRA -- Session
- Funding Stream:** TAA
- Line Code:** TAA - Remedial TRA (Trade Readjustment Allowance)
- Provider:** Indiana WorkOne System
- Training Provider ID:** (empty field)
- O*Net Code:** (empty field)
- Summary Description:** TRAR
- Status:** Active
- Planned End Date:** 04/24/2009
- Actual End Date:** (empty field)
- Record Created By:** (empty field)

Below the form, there is a "Service Notes" section with a text area containing "Start TRAR benefits".

The "Historical Data" section at the bottom lists read-only information:

- O*Net Code (read-only):
- Client Intake Site:
- Provider Name:
- Case Mgr Name:
- Office Name:
- WSA:
- Total Hours:
- Total Obligated:
- Total Expended:
- Created Date:

At the bottom right, there are buttons for "Save", "Pause", and "Cancel".

TAA & TrackOne

Entering a Job Search

Job search allowance and job search reimbursement are two distinct services that will need to be entered separately.

The request for a job search allowance must be submitted and approved prior to the job search taking place and within 365 days of the layoff or 182 days after training has ended.

To enter a request for a job search allowance:

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button; this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select TAA - Job Search Allowance.
- Click the "Search" button; the search will generate a list of services.

NOTE: Do not use Resume Development, Job Search Assistance in the IRA, or TAA Job Search Workshops. These are ES services and not TAA funded services

- Click the TAA - Job Search App. & Approval Session.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "Job search allowance."
- Click the down list arrow to the right of "Status" and select active.
- In the "Planned End Date" field, enter the date the request was submitted.
- The "Actual End Date" will be the date the request was submitted.
- Service Notes: Enter the circumstances surrounding the Job Search.

TAA & TrackOne

Entering a Job Search

- Click the save button.
- Enter a case note documenting eligibility and rationale for the decision to approve a job search allowance.

NOTE: Submit the job search form to State TAA Coordinator.

The screenshot displays the TrackOne web application interface within a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://www.trackone-in.com> - ClientTrack.Net. The page header includes the TrackOne logo and the user name 'Greg Richmond - Indy WIA Training' with links for 'Help Topics', 'About DSI', and 'Logout'.

The left sidebar contains navigation tabs: 'User Home' and 'Case Management'. Under 'Case Management', there are links for 'Add New Client' and 'Find Client'. Below this, a client profile for 'Maris, Roger' is shown with ID '000-00-0009' and birth date '2/5/1953'. A 'Case Management' menu lists options like 'Client Home Page', 'Reminders/Tasks', 'Edit Participant', 'Work History', 'Enrollment and Application', 'Services', 'Goals', 'Case Notes', 'Credentials', 'Test Results', 'Print ISS', and 'TAA Forms'. An 'Administration' section includes 'Administrative File Review'.

The main content area is titled 'Indy WIA Activities' and 'Activity'. It prompts the user to 'To add an activity, enter the following information.' The form fields include:

- Begin Date:** 04/26/2007
- Activity/Service Title:** Job Search App. & Approval Session
- Funding Stream:** TAA
- Line Code:** TAA - Job Search Assistance
- Service Type:** Indiana WorkOne System
- Provider:** Training Provider ID: (empty field)
- O*Net Code:** (empty field)
- Summary Description:** Job Search Allowance
- Status:** Active
- Planned End Date:** 04/26/2007
- Actual End Date:** (empty field)
- Record Created By:** (empty field)

Below the form fields, there is a 'Service Notes' section with a text area containing 'Circumstances surrounding the Job Search'. A note states: 'Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.'

The bottom section is titled 'Historical Data' and lists read-only fields:

- O*Net Code (read-only):
- Client Intake Site:
- Provider Name:
- Case Mgr Name:
- Office Name:
- WSA:
- Total Hours:
- Total Obligated:
- Total Expended:
- Created Date:

At the bottom right, there are buttons for 'Save', 'Pause', and 'Cancel'.

TAA & TrackOne

Entering a Job Search Reimbursement

Once the job search allowance has been approved, the participant will need to bring in the required receipts for gas, lodging and meals. Upon receipt, the case manager will need to submit a request for reimbursement.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select TAA - Job Search Allowance.
- Click the "Search" button, the search will generate a list of services.

NOTE: Do not use Resume Development, Job Search Assistance in the IRA, or TAA Job Search Workshops. These are ES services and not TAA funded services,.

- Click the TAA - Job Search Reimbursement Submitted – Session
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "Job search allowance".
- Click the down list arrow to the right of "Status" and select active.
- In the "Planned End Date" field, enter the date request was submitted.
- In the "Actual End Date" field, enter the date the request was submitted.
- In the "Service Notes" field, enter the payment information
- Click the "Save" button.
- Enter a case note documenting eligibility and decision to approve a job search allowance.

TAA & TrackOne

Entering a Job Search Reimbursement

NOTE: Submit Job Search form to the State TAA Coordinator.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home **Case Management** Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

[Add New Client](#) [Find Client](#)

Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 04/26/2007

Activity/Service Title: Job Search Reimbursement Submitted - S

Funding Stream: TAA

Line Code:

Service Type: TAA - Job Search Assistance

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: Job Search Allowance

Status: Active

Planned End Date: 04/26/2007

Actual End Date:

Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes: Payment Information

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

Save Pause Cancel

Done Internet

TAA & TrackOne

Entering a Relocation Allowance

Relocation Allowances are similar to job search allowances, in that there are two distinct services. The first is a request for relocation allowance, which must be submitted prior to the relocation. The second is the request for the actual reimbursement. The request for relocation allowance must be submitted within 425 days after the layoff or 182 days after training has ended.

We will complete the request for Relocation Allowance first.

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow and scroll down and select TAA - Relocation Allowances.
- Click the "Search" button; the search will generate a list of services.
- Click the Relocation Allowances App. & Approval Session.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "Relocation Allowance."
- Click the down list arrow to the right of "Status" and select active.
- In the "Planned End Date" field, enter the date request was submitted.
- In the "Actual End Date" field, enter the date the request was submitted.
- In the Service Notes text box, enter the circumstances surrounding the relocation.
- Click the save button.
- Enter a case note documenting eligibility for a relocation allowance.

NOTE: **Submit Relocation form to State TAA Coordinator.**

TAA & TrackOne

Entering a Relocation Allowance

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Maris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 04/26/2007

Activity/Service Title: Relocation Allowances App. & Approval Se

Funding Stream: TAA

Line Code:

Service Type: TAA - Relocation Allowance

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: Relocation Allowance

Status: Active

Planned End Date: 04/26/2007

Actual End Date:

Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Circumstances surrounding the Relocation

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

Save Pause Cancel

TAA & TrackOne

Entering a Relocation Reimbursement

Once the relocation allowance has been approved, the participant will need to bring in the required receipts for relocation expenses.

To record a relocation reimbursement:

- Open the participant's file.
- Click the services link on the navigation pane. This will open the activities screen.
- Click the 'Add New' button, this will open the activities screen.
- Click the magnifying glass icon to the right of the activity/service title field. This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow and scroll down and select TAA - Relocation Allowances.
- Click the "Search" button; the search will generate a list of services.
- Click the Relocation Reimbursement Submitted—Session.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "Relocation Reimbursement."
- Click the down list arrow to the right of "Status" and select completed.
- The "Planned End Date" will be the same as the begin date.
- The "Actual End Date" will be the same as the begin date and planned end date.
- In the Service Notes text box, type "request for relocation reimbursement."
- Click the save button.
- Enter a case note justifying the reimbursement request.

NOTE: **Submit the paperwork to the State TAA Coordinator.**

TAA & TrackOne

Entering a Relocation Reimbursement

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Howard, Elston
000-00-0032
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
 - Goals
 - Case Notes
 - Credentials
 - Test Results
 - Print ISS
 - TAA Forms

Administration

- Administrative File Review

Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 05/03/2007
Activity/Service Title: Relocation Reimbursement Submitted - Se
Funding Stream: TAA
Line Code:
Service Type: TAA - Relocation Allowance
Provider: Indiana WorkOne System
Training Provider ID:
O*Net Code:
Summary Description: Relocation Reimbursement
Status: Completed
Planned End Date: 05/03/2007
Actual End Date: 05/03/2007
Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes: Request for Relocation Reimbursement

Historical Data

O*Net Code (read-only):
Client Intake Site:
Provider Name:
Case Mgr Name:
Office Name:
WSA:
Total Hours:
Total Obligated:
Total Expended:
Created Date:

Save Pause Cancel

Done Internet

TAA & TrackOne ATAA Services

The Alternate Trade Adjustment Assistance program is designed for eligible workers, age 50 or older, who obtain new, full-time employment at wages of less than \$50,000 within 26 weeks of their separation. These workers may receive a wage subsidy of 50% of the difference between the old and new wages, up to \$10,000 paid over a period of up to two years.

A worker receiving a wage subsidy under the ATAA program may not receive benefits under the TAA program except the HCTC.

Important Deadline: To qualify for ATAA a worker must obtain qualifying reemployment within 26 weeks of layoff. This remains true even if the certification is not issued until after the 26 weeks have passed.

If you have a participant utilizing ATAA, use the following steps to enter their information into ATAA:

- Open the participant's file and click the enrollment/ application link on the navigation panel.
- Click the gear icon and select "Edit Registration".
- Scroll down to the TAA Tracking section and click on the check box after Apply for ATAA Benefit Determination.
- Scroll to the bottom of the page and click the save button.
- Click the "Services" link on the navigation panel.
- Click the "Add New" button.
- Click the magnifying glass icon to the right of the activity/service title field.
- This will open the "Available Services by Funding Stream" dialog box.
- In the dialog box click the "Funding Stream" down list arrow and select TAA.
- Click the "Service Type" down list arrow, scroll down, and select TAA – ATAA (Alternative Trade Adjustment Assist.).
- Click the "Search" button; the search will generate a list of services.
- Click the TAA - ATAA service from the list.
- Click the down list arrow to the right of the "Funding Stream", select TAA.
- In the "Summary Description" box type "ATAA."
- Click the down list arrow to the right of "Status" and select active.
- Enter the "Planned End Date". This date must be two years from the reemployment date.

TAA & TrackOne ATAA Services

- Enter the “Planned End Date”. This date must be two years from the reemployment date.
- The “Actual End Date” will be the two years from the reemployment date or the receipt of \$10,000 in wage subsidies, which ever comes first.
- In the Service Notes, type “ATAA eligible.”
- Click the save button.
- Enter a case note. The case note must document that the ATAA application has been submitted to the State ATAA Coordinator.

NOTE: **You will need to enter or extend the HCTC end date.**

TAA & TrackOne ATAA Services

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Harris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Enrollment and Application

The list below displays the client's enrollments. To create an application for eligibility for intensive services, select the Add Application option from the Action menu next to the desired record. To edit an existing application, select the Edit Application option from the Action menu.

Cancel

records found:

Enroll Date	App. Date	Interviewer	Organization	Region Eligibility
7	Greg Richmond	Indiana Dept. of Workforce Development	Adult, Disl Wkr, TAA	

[Edit Registration](#)
[Edit Application](#)
[Accounts](#)
[Monthly Contact](#)
[Follow Ups](#)
[Exit Information](#)
[Print App/Enrollment](#)
[Planned Gap in Service](#)

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Harris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
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- TAA Forms

Administration

- Administrative File Review

ATAA Reemployment

TAA Application Date:

TAA Petition #: 58952

Company: Bartlett Corporation

Location: Muncie

TAA Participant ID:

Apply for ATAA Benefit Determination: ☒

ATAA Reemployment Make sure appropriate verification documents have been mailed to DVD in regard to the employment listed below:

Reemployment Job for Benefit Determination:

Eligible for ATAA: ☐

Reason Not Eligible for ATAA:

TAA Training Contract/Waiver

Training Waiver/Reason:

Training Program ID:

Training Contract Review Date:

Total Cost of Training:

Total Expenses Paid by TAA:

Total Travel Expenses Paid:

Total Subsistence Expenses Paid:

Total Other Expenses Paid:

TAA Deregistration Notice: ☐

Other Federal Enrollment code:

TrackOne - ClientTrack.Net - Microsoft Internet Explorer

Greg Richmond - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Harris, Roger
000-00-0009
2/5/1953

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Indy WIA Activities

Activity

To add an activity, enter the following information.

Begin Date: 04/26/2007

Activity/Service Title: TAA - ATAA (Alternative Trade Adjustment)

Funding Stream: TAA

Line Code:

Service Type: TAA - ATAA (Alternative Trade Adjustment Assist.)

Provider: Indiana WorkOne System

Training Provider ID:

O*Net Code:

Summary Description: ATTA

Status: Active

Planned End Date: 04/24/2009

Actual End Date:

Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes: ATAA Eligible

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

Save Pause Cancel

TAA & TrackOne Entering A Goal

Goals and goal setting are recognized as being critical for success. While goals are only a required service for WIA Younger Youth, as a TAA case manager, you should work with your participant to negotiate realistic and well defined goals. This is recommended as a case management best practice and to encourage the participant to take ownership of the services he/she receives.

To record goals:

- Click the goals link in the navigation pane.
- Click the “Add New” button.
- Select “Open.”
- Click the down list for “Goal Type”. Select the type that is the most appropriate for the goal.
- Click the down list and select the goal.
- Type in the goal description.
- Enter a goal date. This is date the goal was set.
- Enter an estimated completion date.
- Leave the actual completion date blank at this time.
- Enter a detailed explanation of the goal.
- Click the save button.

NOTE: When the participant completes or achieves the goal, you will need to update the goal record to input the actual completion date.

TAA & TrackOne Entering A Goal

https://www.trackone-in.com - ClientTrackNet - Microsoft Internet Explorer

TrackOne @Work Solutions

Greg Richmond - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

Indy WIA Goal Plan

Goal

Identify the information on the participant's individual goal.

Goals can be set up for all participants. If recording an employment goal, select the Goal Type "Employment Goal". All other goals for WIA participants (Older Youth, Adult, Dislocated Worker) or TAA participants use the "Other, Non-younger youth".

WIA Youth Goals: The WIA Goal Type (Basic Skills, Occupational Skills, Work Readiness) must be selected for WIA Younger Youth. Youth goals must be attained within one year; if the youth does not attain the goal within one year of the date it was set, the Status must be set to "NOT Attained." Younger Youth Skill Attainment rate is a performance measure which looks at the skills set and attained for younger youth.

Status: * ☒ Open
☐ Attained
☐ NOT Attained

Goal Type: * Occupational Skills

Goal: Perform Actual Tasks

Goal Description: Participant will obtain Occ

Goal Date: * 04/26/2007

Estimated Completion Date:

Date Attained:

Explanation: * Mr. Maris will obtain the Occupational Skills necessary to find employment as a LPN

Goal Type

-- SELECT --

-- SELECT --

Basic Skills Goal

Occupational Skills

Other

Work Readiness

Goal Description

-- SELECT --

-- SELECT --

Perform Actual Tasks

Familiarity w/ Procdures, Tools

Technology

Information Skills

Other Occupational Skills Goal

TAA & TrackOne Entering Case Notes

Case notation is essential to case management. It is essential that case notes be focused on the services provided, contain detailed information documenting service delivery and record the flow of the case management process. Case notes are NOT intended for case managers to write their personal feelings, frustrations or opinions about the participant and his/her progress. Case notes should be factual and concise.

NOTE: Case notes cannot be deleted in TrackOne. They can be amended through the addition of another case note if necessary but cannot be edited once they are saved.

To create a case note:

- Click on the case notes link on the navigation pane.
- Click the “Add” button.
- Type in the case note.

NOTE: There is a toolbar similar to the one in MS Word.



- Once you have completed the case note, proofread it and click the save button.


To review previously written case notes:

- Click on the case note link on the navigation pane to open the case note screen.
- Click on the view icon to the right of the case note you wish to review.

To print a case note:

- Click the selection square under the word print for the case note; click the “Print” button. The print dialog box will open. This box allows you to choose the number of copies, etc.

1 records found.

	Print	Date	Case Manager	Regarding	Restriction
 View	<input type="checkbox"/>	4/26/2007	Greg Richmond	Training	Unrestricted

- Click “OK”.

NOTE: Case notes pertaining to domestic violence should be marked as such. Victims of domestic violence are afforded special confidentiality protections under the Violence Against Women Act. TrackOne allows a case manager to limit access to any case note pertaining to domestic violence by marking it as restricted.

TAA & TrackOne Entering Case Notes

Adding a Case Note

The screenshot shows the TrackOne web application interface. On the left is a navigation menu with sections like 'Case Management' and 'Administration'. The main area is titled 'Add New Case Note' for client 'Marks, Roger'. It includes fields for 'Entry Date' (04/26/2007), 'Entered By' (Greg Richmond), and 'Regarding' (Training). There is a checkbox for 'Domestic Violence Case Note'. Below these is a rich text editor with a toolbar and a 'Select a Template' dropdown. The 'Case Note' text area contains the following text:

Client Name: Roger Marks
Beginning April 26, 2007, Roger is to start taking classes at Ivy Tech Community College. He will be working towards an AA in Electronic Engineering. I explained the attendance and grade requirements and gave him a copy of the policy. He agrees to bring in his Attendance Sheets every week and a copy of his grades at the end of each semester. Roger also agreed to notify me prior to making any changes in his classes or major. Roger agreed to notify me if he was having any problems.

Below the text area, there is a line of text: *Roger hit 61 home runs in 1961*. At the bottom right are 'Save', 'Pause', and 'Cancel' buttons.

Printing a Case Note

The screenshot shows the 'Client Case Notes' section of the TrackOne web application. It displays a list of case notes for client Roger Marks. A red box highlights the 'Print Selected' button. Below the button, a table shows the details of the case note.

	Date	Case Manager	Regarding	Restriction
<input checked="" type="checkbox"/>	4/26/2007	Greg Richmond	Training	Unrestricted

TAA & TrackOne Entering Credentials

Credentials are standards of achievement that verify a level of skill attainment. When a client finishes a training program, a record of the credential attained needs to be entered in to TrackOne.

To record a credential:

- Click “Credentials” in the navigation pane.
- Click the “Add New” button.
- Click the “Credential Type” down list arrow and select the appropriate credential from the list.
- In the “Description” field, enter a brief description of the earned credential. Specify what field of study the credential is targeted.
- The “Planned Attain Date” should be the same as the training completion date.
- The “Actual Attain Date” is the date training was completed and the credential was attained.
- In the “Comments” text box, enter in any additional comments you may have about the credential.

Credential Type

The screenshot shows the TrackOne web application interface. On the left is a navigation pane with sections for Case Management and Administration. The main content area displays the 'WIA Credentials Summary' for a client named Roger Maris. The 'Credentials' section is active, showing a form with the following fields:

- Credential Type:** A dropdown menu is open, showing a list of options: None, High School Diploma, GED, HS Equivalency (Disability), AA/AS Diploma/Degree (highlighted), BA/BS Diploma/Degree, Occupational Skills License, Occupational Skills Certificate/Credential, Journeyman Status, Certificate of Technical Achievement, and Other.
- Description:** AA in Nursing
- Planned Attain Date:** 04/24/2009
- Actual Attain Date:** (empty)
- Comments:** Degree will qualify participant for tacking the LPN License Exam.

At the bottom of the form are buttons for Save, Pause, and Cancel.

TAA & TrackOne Test Results & ISS/IEP

Conducting formal assessments are a large part of the case management process. Formal assessments are essential to determining the participant's skills and abilities prior to entering him/her in to training programs. Assessments, and their results, need to be entered in TrackOne.

To record assessment results:

- Click on the "Test Results" folder on the navigation pane and it will open the test results screen.
- Click the "Add New" button. The Test Results screen will open.
- Click the test name on the down list arrow to select the test that was given.
- Click the test type down list arrow to select test type (Oral, Manual, Dexterity or Written).
- Click the save button.

Individual Service Strategy/Individual Employment Plan

A written case management plan is essential to the case management process.

TrackOne simplifies this greatly by creating an Individual Service Strategy/Individual Employment Plan automatically. TrackOne "mines" data from all of the participant transaction records the case manager has created in the system. The system then populates the fields in the ISS/IEP form with the data previously entered.

To print this form:

- Click on the "Print ISS" link on the navigation pane.
- Click the print icon to print the document.

TAA & TrackOne Test Results & ISS/IEP

TrackOne ClientTrack - Microsoft Internet Explorer

Greg Richmond - Judy WIA Help Topics About DSI Logout

Add New Client Find Client

Client Test Results

0 records found.

Test Name	Description	Date	Score	Grade Level
-----------	-------------	------	-------	-------------

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results**
- Print ISS
- TAA Forms

Administration

- Administrative File Review

TrackOne ClientTrack - Microsoft Internet Explorer

Greg Richmond - Judy WIA Training Help Topics About DSI Logout

Mary, Kinger
000-00-0000
2/20/1993

Test and Test Results

Identify the test the client took along with the results of that test

WIA Youth Literacy and Numeracy Gains Measures:
Test names marked with (Y) can be used to assess literacy and numeracy skills for the WIA Youth performance measures. Test names marked with (Y/ESL) can be used to assess English literacy skills for English as a Second Language (ESL) youth for the WIA performance measures.

For the performance measures, youth must be given a pre-assessment within 60 days of enrolling in WIA, and a post-assessment within one year, and once a year thereafter while they are participating in WIA.

Test Name:

Test Type:

Date:

Score:

Grade Level:

Passing/Competent: ☐

Description/Comments:

Save Pause Cancel

TrackOne ClientTrack - Microsoft Internet Explorer

Greg Richmond - Judy WIA Help Topics About DSI Logout

ClientTrack.net
Empowering organizations with integrated application solutions

The report has been launched in a new window.

[Relaunch the Report](#)

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
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- Services
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- TAA Forms

Administration

- Administrative File Review

TrackOne ClientTrack - Microsoft Internet Explorer

Greg Richmond - Judy WIA Help Topics About DSI Logout

U.S.S. for Hamilton, Deleanechia Report Date: 03/16/2007

INDIVIDUAL SERVICE STRATEGY / INDIVIDUAL EMPLOYMENT PLAN

Name: Hamilton, Deleanechia Social Security Number: 314-86-9179

Address: 1626 W 19 St Anderson, IN 46016 D.O.B.: 01/22/1968

Phone: 765-840-4154 First Service Date: 11/30/2006

Email Address:

INITIAL ASSESSMENT

Employment Status At Start: Educational Status At Enrollment: Years of School Completed:

Credentials

Employment History

Position	Employer	Start Date	End Date	Status	Hours Per Week	Hourly Rate
	Guide Corp	5/24/99	1/12/07	FT	40.00	25.48

Job Duties, Specialized Skills, and Equipment Used:

COMPREHENSIVE & SPECIALIZED ASSESSMENT

Assessment Tools Administered:

TAA & TrackOne TAA Forms

The TrackOne system will generate a few of the TAA forms that need to be printed for the participant's file. TrackOne will auto-populate several of the fields on the forms to save the case manager from having to type information already contained in the system.

To print the forms:

- Click on the small plus sign just to the left of the TAA forms link on the navigation pane. This will expand the menu to show links to the following forms.
 - TAA Waiver
 - TAA Job Search
 - TAA Relocation
 - TAA Training

(Each form is shown on the next page.)

- Print the forms and either submit or place in the participant's file as appropriate.

TAA & TrackOne Forms

**Trade Adjustment Assistance Program
Waiver of the Training Requirement**

Application Date: 04/18/2007 Local Office: Indiana Dept. of Workforce Development

Name: Maris, Roger SSN: 000-00-0009

Petition: _____

Waiver Issue Date: 04/18/2007 (must be on or after separation and application date)

Waiver Expiration Date: 04/18/2007 (must be within six months of issue date)

Extended Expiration Date: _____ (maximum end of Basic TRA)

Certification Date: _____

Separation Date: _____

8 Week Deadline: _____

16 Week Deadline: _____

45 Day Extension: Y N

Reason: _____

Waiver Criteria:

Benefit Rights:

- Your waiver is in effect for six months after issuance. At the end of the six-month period, if you are otherwise eligible, your waiver can be extended to the end of your Basic TRA.
- Your waiver must be renewed and renewed every 20 days. If you fail to attend one renewal session, you may lose your TRA benefits temporarily. If fail to attend a second session, your waiver will be revoked and your benefits will be terminated.
- Your waiver will be revoked if your circumstances change OR you become enrolled in training.
- Waivers cannot be back dated under any circumstances.
- You have received and read the Benefit Rights Overview for TAA.
- You may appeal any TAA/TRA determination that results in the loss of benefits.
- Release of Information: I hereby authorize the school/employer/ATAA to release personal data records that are relevant to my participation in training, job search, relocation, ATAA, or TRA programs under the Trade Act. This consent will expire when TAA funding or approval ceases, or when the worker has received that last service for which s/he is eligible.

The waiver issue date must be the same or greater than the date signed by the worker and the local TAA coordinator

Worker: _____ Date: _____

TAA Coordinator: _____ Date: _____

No TRA payments will be made without the written authorization of the State TAA Coordinator

State TAA Coordinator: _____ Date: _____

**Trade Adjustment Assistance Program
Job Search Application and Approval**

Application Date: 04/18/2007 Local Office: Indiana Dept. of Workforce Development

Name: Maris, Roger SSN: 000-00-0009

Petition: _____ TAA ID: 70008 Separation Date: _____

Criteria for Job Search Allowances
(TAA coordinator and claimant must initial)

_____ / Application filed prior to job searching

_____ / Totally separated from adversely affected employment

_____ / Fully registered in CSI

_____ / No reasonable expectation of securing suitable employment within the commuting area

_____ / There is a reasonable expectation of securing suitable employment in area in which the search is being conducted

_____ / Job search application made within 365 days of layoff or 182 days after completion of TAA/Approved training

Name and Address of Firm Where Interview is Scheduled: _____ Job Title: _____ Date of Interview: _____

Salary/Range Range: _____ Date and Time of Separation: _____ Mode of Transportation: _____

I give this information to support my request for job search allowance under the Trade Act of 1974, as amended. The information contained in this request is correct and complete to the best of my knowledge. I understand that penalties are provided for willful misrepresentation made to obtain allowances to which I am not entitled.

Release of Information: I hereby authorize the school/employer/ATAA to release personal data records that are relevant to my participation in training, job search, relocation, ATAA, or TRA programs under the Trade Act. This consent will expire when TAA funding or approval ceases, or when the participant has received that last service for which s/he is eligible.

Worker: _____ Date: _____

TAA Coordinator: _____ Date: _____

**Trade Adjustment Assistance Program
Relocation Allowances Application and Approval**

Application Date: 04/18/2007 Local Office: Indiana Dept. of Workforce Development

Name: Maris, Roger SSN: 000-00-0009

Petition: _____ TAA ID: 70008 ATAA Eligibility: Y N

Criteria for Job Search Allowances
(TAA coordinator and claimant must initial)

_____ / Application filed prior to job searching

_____ / Totally separated from adversely affected employment

_____ / No prior relocation under the same petition - OR - allowances claimed by a family member for the same relocation

_____ / Relocation within the United States and outside the commuting area

_____ / Fully registered in CSI

_____ / No reasonable expectation of securing suitable employment within the commuting area

_____ / Relocation to begin within 182 days of application

Name and Address of Firm Offering Employment: _____ Job Title: _____ Starting Date: _____

City and State of Relocation: _____ Expected Date of Move: _____

I give this information to support my request for job search allowance under the Trade Act of 1974, as amended. The information contained in this request is correct and complete to the best of my knowledge. I understand that penalties are provided for willful misrepresentation made to obtain allowances to which I am not entitled.

Release of Information: I hereby authorize the school/employer/ATAA to release personal data records that are relevant to my participation in training, job search, relocation, ATAA, or TRA programs under the Trade Act. This consent will expire when TAA funding or approval ceases, or when the participant has received that last service for which s/he is eligible.

Worker: _____ Date: _____

TAA Coordinator: _____ Date: _____

**Trade Adjustment Assistance Program
Training Application and Approval**

Application Date: 04/18/2007 Local Office: Indiana Dept. of Workforce Development

Name: Maris, Roger SSN: 000-00-0009

Petition: _____

ATAA Eligible: Yes No

Employment Goal: _____

Highest Grade Completed: 17

Degrees (type and date): _____

Certification Date: _____

Separation Date: _____

8 Week Deadline: _____

16 Week Deadline: _____

45 Day Extension: Y N

Reason: _____

ASSESSMENT OF THE SIX CRITERIA

_____ / There is no suitable employment (which may include technical and professional employment) available to the worker

_____ / The worker would benefit from appropriate training

- This worker needs this training and training meets the worker's needs
- The worker has the mental and physical capabilities to undertake, make satisfactory progress in, and complete the training
- The individual will be job ready upon completion of the training - using the skills and education acquired while in the training

_____ / Training is approved by the Secretary (of Labor) and reasonably available to the worker within the worker's commuting distance. If not, please explain: _____

_____ / The worker is qualified to undertake and complete such training successfully

- The worker has the physical, mental, and educational background and financial resources adequate to undertake and complete the specific program being considered
- The worker has financial resources to complete school when the TRA is exhausted

_____ / Such training is suitable for the worker and available at a reasonable cost. Lowest priced provider. If not, please explain: _____

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Exiting A Participant

When a participant has completed all training, case management goals and no other significant staff involved/intensive/training services are necessary for the participant to be successful, the case manager must exit the participant from the program.

NOTE: Under common measures, the participant is exited from all programs he/she is enrolled on the same date. In other words, if a participant is co-enrolled in WIA and TAA, the participant is not exited from either program until the participant meets the exit criteria for both programs. Please refer to the information on common exit dates in the common measures information located on the DWD TrackOne Technical Guidance & Resources website.

NOTE: To save time, update the work history record before completing the exit information screens.

To exit a participant:

- Click on the “Enrollment/Application” link on the navigation pane.
- Click the gear icon.
- Select “Exit Information.”
- Enter the “Planned Exit Date”. This is the date the case manager believes is the last date the participant will receive services.
- Enter the “Date Completed All Goals.”
- Enter the “Exit Code” by selecting the appropriate choice from the drop down menu.
- Complete the rest of the screen as appropriate.
- Enter a case note documenting the exit, reasons for exit and any other pertinent information.

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Exiting A Participant

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Amy Rubeck - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management** Employer Management Provider Management Housing Management Grant Management Issues Tracking

[Add New Client](#) [Find Client](#)

rubeck, amy l
999-12-6678
8/31/1969

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Test

- KLG Enrollment and Application
- KLG Admin Application Test

Case Closure Information

To exit a client from the Application and Enrollment, please complete the following information.
To review and/or update the client's work history, click the **Update Work History** button; please make sure this information is up-to-date when the client is exited.

[Update Work History](#)

Participation Date:
Last Service Date:
Planned Exit Date: 05/05/2007
Date Completed All Goals: 05/05/2000
Exit Code: Entered Unsubsidized Employment
Actual Exit Date:
Reason:

Exit - Educational-If the reason for exit was educational, please complete the following information

School Status at Exit: -- SELECT --
Was a Degree Attained: -- SELECT --
Post Secondary Education: ☐
Advanced Training: ☐
Enrolled in Educ. Program During Participation: ☐
Military Service: ☐
Apprenticeship: ☐

Exit - Employment-If the exit is due to employment, please complete the following information.

Exit Work History: -- SELECT --

Done

start Removable Disk (E:) 4May2007 AMYsEDI... http://www.trackon... https://www.trackon... 8:39 PM

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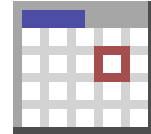
TrackOne Icons



Action



Alert



Calendar



Clipboard



Contact



Delete



Edit Document



View Document



Exit Document



Flag



Home



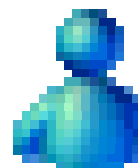
Journal



Financial (Money)



Print Document



User

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TrackOne Acronyms

<i>Acronyms and Abbreviations</i>	<i>Terminology</i>
App.	Application
ATAA	Alternate Trade Adjustment Assistance
CS3	Customer Self Service System
DSI	Data Sytems International
DWD	Department of Workforce Development
ES	Employment Service
FEIN	Federal Employer Identification Number
HCTC	Health Care Tax Credit
IRA	Information Resource Area
POP	Period of Participation
SDM	Service Delivery Model
SSI	Strategic Skills Initiative
T1	TrackOne
TAA	Trade Adjustment Assistance
TAPR	Trade Adjustment Performance Reports
TRA	Trade Readjustment Assistance
TRA-A	Trade Readjustment Assistance Additional
TRA-B	Trade Readjustment Assistance Basic
TRA-R	Trade Readjustment Assistance Remedial
VA	Veterans' Administration
WIA	Workforce Investment Act
WISPR	The Workforce Investment Standardized Performance Report

TAA & TrackOne

Application Documentation

Citizen Eligible to Work	
1. Birth Certificate 2. Alien Registration Card 3. U. S. Passport 4. Public assistance records 6. DD-214, Report of Transfer or Discharge (If place of birth is shown)	7. Food Stamp records 8. Foreign Passport stamped "Eligible to Work." 9. Hospital record of birth 10. Native American tribal document 11. Naturalization Certification 12. Baptismal Record with place of birth 13. A Department of Correction record, which indicated citizenship.
Social Security Number	
1. DD-214, Report of Transfer or Discharge 2. Unemployment Insurance wage records 3. Employment records 4. IRS form Letter 1722	5. Letter from Social Services agency 6. Pay stub 7. Social Security card 8. W-2 form
Birth Date Age	
1. Baptismal record 2. Birth Certificate 3. DD-214, Report of Transfer or Discharge 4. Driver's License 5. Federal, State or Local government identification card 6. Hospital record of birth	7. Passport 8. Public assistance/Social service records 9. School records/identification card 10. Work Permit 11. Cross match with Department of Vital Statistics 12. Tribal records

TAA & TrackOne

Glossary

Activity/Service: An activity or service is a product or action provided to a participant. Activities and services occupy a continuum that ranges from self-service activities to services that require significant staff involvement.

Additional Trade Readjustment Assistance (TRA-A): TRA-A is a monetary support benefit paid through the Unemployment Insurance program. This is available to qualified participants once their 26 weeks of TRAB is exhausted. To qualify the participant must be enrolled in a TAA approved training plan.

Application: An application is a request for significant staff involved/intensive/training services. In TrackOne, the application records information necessary to determine a participant's eligibility for workforce investment programs. An application is NOT an enrollment/registration.

Basic Trade Readjustment Assistance (TRA-B): TRA-B is a monetary support benefit paid through the Unemployment Insurance program. TRA-B is available to qualified participants once their 26 weeks of Unemployment Insurance is exhausted. To qualify, the participant must be enrolled in a TAA approved training plan or have been given a waiver from training. The participant must have been approved for or waived from training within eight weeks of the certification of the company's TAA petition if laid off prior to the certification or within 16 weeks of their layoff date if the layoff occurred after the certification.

Common Measures: A uniform metrics and program evaluation tool. See TEGL 17-05 for full details.

Disabled Veteran: A veteran that has been deemed by the Veteran's Administration to have a disability resulting from military service. The disability has been rated from 0% to 20%. VA ratings are computed in 10% increments.

Enrollment: The act of entering a participant in program services following an eligibility determination. Enrollment and registration are interchangeable terms. Both differ from the term "application."

Health Care Insurance Tax Credit: This is a tax credit worth 65% of the cost of your health insurance premium for a qualified health insurance program, including COBRAs, your spouses insurance if they pay more the 50% of the coverage, and private insurance that was in effect 30 days prior to layoff.

Job Search Allowance: An allowance that reimburses a participant up to 90% of necessary transportation expenses incurred while searching for work outside the participant's normal commuting range. Job search allowances are limited to \$1,250.00. They are recorded in TrackOne as "intensive" or "significant staff involved" services.

TAA & TrackOne

Glossary

Occupational Skills Training: Classroom, Vocational or Technical training that will provide individuals skills germane to an occupation in demand. This would be reported in TrackOne as an “Intensive” or “Significant Staff Involvement” service.

Participant, Client, Customer: Interchangeable terms referring to an individual who receives services in the Indiana workforce investment system.

Period of Participation: Period of time a participant receives services commencing with the first core service and ending with the last significant staff involved/intensive/training service.

Planned Gap in Service: A period of inactivity in funded services due to an illness of the participant, an illness involving a family member of the participant, a temporary relocation of the participant, (i.e. called to active duty from the Reserves or National Guard) or a delay in the training start date.

Registration: See definition for “enrollment”. Term used interchangeably with enrollment.

Relocation Allowance: An allowance that reimburses up to 90% of the reasonable and necessary expenses incurred from moving to an area outside the participant’s normal commuting distance. A bona fide job offer must be tendered to the participant for he/she to be eligible and the allowance must be applied for and approved prior to the move taking place. Additionally, participants that qualify for relocation expenses will receive a lump sum settlement of three times their weekly wage up to a maximum of \$1,250.00.

Remedial Trade Readjustment Assistance (TRA-R): TRA-R is a monetary support paid through the Unemployment Insurance program that provides an additional 26 weeks of benefits after TRA-A benefits are exhausted. This is available to qualified participants enrolled in a TAA approved training plan and participants must have been approved for and attended remedial classes prior to entering their approved training program.

Veteran: A person who served on active duty in the U. S. military for purposes other than training, for 180 days and was released with other than a dishonorable discharge. A Title X Veteran is any one called to active duty from the National Guard or Reserves.

TAA & TrackOne

Glossary

Soft Exit: An exit generated by the system after 90 days without receiving a service from any program.

Special Disabled Veteran: A veteran that has been deemed by the Veteran's Administration to have a service connected disability. The disability has been rated from 20% to 100%. VA ratings are computed in 10% increments.

Trade Adjustment Assistance: A federal program available to workers who have lost their jobs due to foreign imports or due to products and production lines being moved outside the United States. The goal of the TAA program is to return adversely affected workers to employment as quickly as possible and at the highest possible wage.

Trade Adjustment Services: Services provided under the Trade Adjustment Assistance Act.

Veteran: A person who served on active duty in the U. S. military for purposes other than training, for 180 days and was released with other than a dishonorable discharge. A Title X Veteran is any one called to active duty from the National Guard or Reserves.